



Salesforce Spring '18 Release Notes

Salesforce, Spring '18

Blaze new trails to customer success



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SALESFORCE SPRING '18 RELEASE NOTES

Blaze new trails to customer success with the latest and greatest product updates in Spring '18. From exciting enhancements to the Lightning Platform to innovative breakthroughs in artificial intelligence (AI), learn about new features across our clouds. Get your org ready for the release and ensure customer success at every turn.

IN THIS SECTION:

[How to Use the Release Notes](#)

Our release notes offer brief, high-level descriptions of enhancements and new features. We include setup information, tips to help you get started, and best practices to ensure your continued success.

[How and When Do Features Become Available?](#)

Some features in Spring '18 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

[Supported Browsers](#)

We've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

[Salesforce Overall: Improved Productivity with Lightning Experience Personalized Navigation, Themes, and Surveys](#)

Personalize your app's navigation bar to suit the unique way you work. Explore the new themes, macros, and quick text. Create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. Lightning Console Apps has something new for every admin, agent, and developer. Filters arrive to Account and File search results. And regardless of the regulations and policies with which you're complying for data protection and privacy, we give you guidance in evaluating the best way to meet your requirements.

[Lightning Experience: A Modern and Intelligent User Experience](#)

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

New features and improvements deepen Einstein's ability to help you close deals, predict your bottom line, strengthen customer relationships, and more.

[Sales: New and Improved Einstein Features, LinkedIn Integration for Leads, and Enhanced Productivity Tools](#)

Get smarter with Einstein Forecasting and Einstein Opportunity Scoring. Use LinkedIn as a source for lead generation. Help reps be more efficient with call monitoring in Lightning Dialer, improved list email, and other tools.

[Marketing: Content Sharing, Enhanced SMS and Push Messages, and Other Features](#)

Build a single view of customer-leveraging data from any source. Plan and optimize unique customer journeys based on your company's business objectives. And deliver personalized content across every channel and device at the right time. Marketing Cloud helps marketers measure the impact of each interaction on your business to optimize your approach and deliver better results.

[Service: Knowledge Article Sharing, Return Orders, and Mass Quick Actions for Cases](#)

Build a stellar customer service experience with Service Cloud Essentials, a new edition of Service Cloud tailored to the needs of small businesses. Boost your Knowledge efforts with export functions, article sharing, and translation approval processes, and incorporate the Knowledge component into your Live Agent implementation. Track field service product returns and repairs with the help of return orders, get up to speed quickly with a new guided setup, and customize the Field Service Lightning mobile app experience by user profile. Enjoy mass quick actions for cases and leads, macro support for all objects, and a more powerful Snap-ins SDK. Finally, take advantage of a host of improvements to Service Cloud in Lightning Experience, including quick text support, a dressed-up social conversation sidebar, and a richer Live Agent experience.

[Analytics: Reports and Dashboards and Einstein Analytics](#)

Powerful and familiar features grace the second beta release of the Lightning report builder: bucket columns, cross filters, and summary formulas. Subscribe to Lightning Experience dashboards, and give them a splash of color. Help users get started in Einstein Analytics with integrated and fun learning features. Quickly query and visualize data in a guided, natural language conversation (beta). Save views of dashboards that you've set up with your preferred selections and filters. Have Einstein analyze your report data with Einstein Data Insights (pilot).

[Communities: Distributed Marketing, 1-to-1 Journeys, and New Support Components](#)

Communities get an even jauntier spring to its step with an abundance of cool features. The Community Cloud is better integrated with the Marketing Cloud with two new features. Partner communities can now take advantage of distributed marketing, which allows partners to use preconfigured customizable campaigns when marketing new programs. Lightning communities can use personalized email journeys to help onboard community members and nurture relationships. Other fabulous additions include customer communities, which can now use the Contact Support Form and Case Deflection components together to help customers find solutions to their issues before they even file a case.

[Chatter: Improved Following, More In-App Notifications, Share Links to Posts](#)

The What I Follow feed is focused on who you actually follow. When people mention one of your groups, you can get an in-app notification. Easily share a link to a post.

[Files: Managing Library Membership, File Preview on the Go, Using Quip with Salesforce](#)

Give your team a way to preview files on the go. Quickly access your most recent asset files, allow standard users to create assets, and provide customers with a way to create asset files that unauthenticated users can access. Flow is a new way to use the File Upload component. Add library members from the Files Home tab with the new Library Member Management feature. Use the Quip Guided setup to integrate Quip and Salesforce.

[Salesforce Integrations: Let Users Add WebEx Meetings to Salesforce Events](#)

Salesforce users who also use Cisco WebEx for their meetings can add their personal room or a new meeting to Salesforce events. This change applies to Lightning Experience only.

[Mobile: Do More on the Go](#)

Salesforce mobile apps help your users stay productive throughout their busy days, no matter where they are. So we've been hard at work adding new ways to help your users outside of the office. Salesforce offers improvements to Chatter and many other sales features, so sales professionals can take care of even more business from their phones.

[Financial Services Cloud: Client Expressed Interests Component, Accelerated Data Loads, and Person Accounts](#)

Users can quickly capture what's top of mind for their customers, whether it's retirement savings or a savings account, and see it all on the client profile with the Client Expressed Interests component. Upload large batch sizes lickety-split with Accelerated Data Loads, our enhancements to bulk uploads. Plus, you can leverage person accounts in Financial Services Cloud. And there's more—keep reading!

[Health Cloud: Flexible Care Plans, Health Assessments, Care Gaps](#)

With goals decoupled from problems, you can use the Health Cloud data model in the way that's right for you. Health Cloud helps you identify gaps in a patient's care, and you can gather survey information to help manage your patients more efficiently.

[Customization: Lightning Apps in Lightning App Builder, Richer Flow Screens, Time Field](#)

While you're making your Home and App pages more dynamic, modify your Lightning apps with the same tool: the Lightning App Builder. Make your flows more awesome by embedding custom Lightning components in your screens and showing users which stage of the flow they're at. Start tracking time-only data with the new Time field type.

[Security and Identity: Hourly Event Log Files, More Dynamic Branding, and Easier Custom Baseline Updates](#)

You can now get event log files hourly or daily, and delete them as needed. Add dynamic branding to your Embedded Login and authentication providers. And update your Security Health Check custom baselines with new settings right from the UI.

[Salesforce IoT: IoT REST API, New Context UI, IoT Usage Monitoring, and Email Alerts](#)

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. Explorer offers built-in integration with Salesforce data and lets you leverage your Customer Relationship Management (CRM) investments in Salesforce. This release includes a new IoT REST API to retrieve and manipulate orchestrations and their related components, and a new user interface for contexts. Also, we're introducing an IoT usage monitoring page, email alerts, and the ability to export and delete IoT data for data privacy.

[Development: Create Your Own Salesforce App](#)

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to Lightning Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

[Critical Updates](#)

This release includes new critical updates for @AuraEnabled Apex controllers, communities and portals, flows, and the URLs used for Visualforce, Community Builder, Site.com Studio, and content files. And we're enforcing the critical update that revokes API access from <lightning:container>.

[Help and Training](#)

We updated our limits documentation. We added Trailhead modules, instructional videos, and walkthroughs. We also updated our Trust and Compliance documentation.

[Other Salesforce Products and Services](#)

How to Use the Release Notes

Our release notes offer brief, high-level descriptions of enhancements and new features. We include setup information, tips to help you get started, and best practices to ensure your continued success.

- We offer [PDF](#) and [HTML](#) versions.
- For the HTML version, your browser's settings determine the language you see. To change the language, scroll to the bottom, click **Change Language**, and select a language.
- The release notes include details about new and modified features, not known issues, which you can access from the [Salesforce Known Issues site](#).



Note: Until the new release is available to you, links from release notes to Salesforce Help, implementation guides, developer guides, and other documentation don't work. And sometimes the links point to materials for the previous release.

Some of our documentation has preview versions available several weeks before the release. To access a preview version on [Salesforce Developers](#), select **Preview** from the Documentation Version dropdown list.

IN THIS SECTION:

[Use Filters to Zero In on the News That Matters Most](#)

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Know What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of organizations will continue to use Salesforce Classic—either exclusively for a while or in tandem with Lightning Experience as it evolves.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

Other Resources

In addition to these release notes, we provide other resources to get you up to speed quickly.

Release Note Changes

Read about changes to the release notes, with the most recent changes first.

Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

Use Filters to Zero In on the News That Matters Most

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Experience

See which features are available in Lightning Experience, Mobile, and Salesforce Classic.

Edition

Which feature enhancements are available to you depends on your edition. Filter the release notes to show only enhancements that are available in your edition.

Feature Impact

Some features require you to enable or configure them before users can get the benefits. As an admin, filter the release notes to focus on, or hide, just those features. Or maybe you want to see only the features that are automatically enabled for your users.

Product Area

See only the products that your org uses. If your org does sales but not support, set up your release notes so that only the sales-related news appears.

To narrow down the list of release notes, click **Show Filters** on the right side of the screen.

The screenshot shows a filter interface for release notes. It includes sections for Experience (Lightning Experience checked, Mobile checked, Salesforce Classic unchecked), Edition (Professional Edition selected), Feature Impact (Enabled for users selected), and Product Area (Analytics checked, API unchecked, Chatter checked, Email Integration unchecked, Communities unchecked, Data.com unchecked, Force.com Customization unchecked, Force.com Development unchecked, Mobile unchecked, Sales checked, Service unchecked, Work.com unchecked). At the bottom are 'Fewer Product Areas' and 'Reset' buttons.

You can share your filtered list of release notes with anyone. Select filters, copy the URL, and then distribute that URL however you want.

Know What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of organizations will continue to use Salesforce Classic—either exclusively for a while or in tandem with Lightning Experience as it evolves.

One key to success during this time of transition is understanding what's available in one, both, or all the Salesforce experiences. To guide you, we've added experience information to these release notes at the highest level where that information applies: for entire clouds or for individual features within clouds. Let's look at some examples.

- Lightning Dialer, a Sales Cloud feature, is available in Lightning Experience only, so its description says "This change applies to Lightning Experience only."
- Einstein Opportunity Scoring, a new Sales Cloud feature, is available in *both desktop experiences*, so its description says "This feature is new in both Lightning Experience and Salesforce Classic."
- Themes and branding, a new platform feature, is available in Lightning Experience *only*, so its description says "This feature is new in Lightning Experience."

If a *key* feature is also available in our mobile app, we mention that in the feature description. But you can also check the Mobile section for a complete list of what's new in the mobile app.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange

Lightning Experience

Idea delivered

Idea Exchange	Idea delivered
Customize My Tabs in Lightning Experience	Supercharge Your Productivity with Personalized Navigation in Lightning Experience
Sales	
Spell Check All Email	Cross Email Spell-Check off Your To-Do List
Analytics	
Save Filters in Wave/Einstein Dashboards	Save Your View of a Dashboard
Communities	
Enable Sharing Sets for Partner Community users	Sharing Sets for All Customer and Partner Licenses—Pilot
Customization	
Custom Time Field	Track Time with the Time Field Type (Beta)
Use Custom Metadata Types in Formulas/Validation Rules	Custom Metadata: Easy-to-Use Referencing of Custom Metadata Type Records in Validation Rules (Pilot)
New Cloud Flow Designer Element - Attach File	Upload Files Directly from a Flow
Dynamically Obtain a Flow Interview Instance from Within Apex	Start Flows Dynamically from Apex
Development	
Debug logging level that prevents ENTERING_MANAGED_PKG from appearing in the log	Avoid Huge Debug Logs for Managed Package Code
Refresh Ability Between Sandboxes	Save Time by Cloning Sandboxes (Beta)

Other Resources

In addition to these release notes, we provide other resources to get you up to speed quickly.

- [Release Readiness & Feature Adoption community](#). Join a community of Salesforce experts.
- [Release demos](#). Get quick video overviews of what's coming this release.
- [Release Overview](#). Create internal training for your users, review setup screens, and learn how to use features.
- [Customer Success Event Calendar](#). Search by release and register for events.
- [Release Readiness Live](#). Register and make the most of the new features.
- [Spring '18 Release](#). Check out the new features.
- [Spring '18 Release module](#). Get the Spring '18 Trailhead badge.
- [Maintenance Exams](#). Keep your certification updated.

Release Note Changes

Read about changes to the release notes, with the most recent changes first.

April 25, 2018

Explore Features with Trailhead

Added a new Trailhead module, Marketing Cloud for Consulting Partners.

Improved CPQ Browser Performance

Added information on the switch from Shadow DOM to Shady DOM in 212.

Create Accurate Invoices for Canceled Orders

Added info about new functionality for invoicing canceled order products.

April 18, 2018

Salesforce Billing: Dynamic Invoice Plans, New Reporting Tools, Simplified Payments

Added additional warnings and prerequisites to the release notes for customers upgrading to Salesforce Billing Winter '18.

Get All Metadata API Entities with Expanded Source Tracking (Beta)

Added information about how to add the feature to the scratch org definition file.

Chat Smarter with Lightning Knowledge

Clarified that sharing articles in chats isn't supported in Live Agent in Lightning Experience.

April 11, 2018

"Stop Automated Field Updates from Suppressing Email Notifications" Critical Update Postponed

Added a release note about the auto-activation date being postponed for the "Stop Automated Field Updates from Suppressing Email Notifications" critical update.

Predict Priorities with Einstein Email Insights

Customers can now use Einstein Email Insights for Inbox.

April 4, 2018

Changed Apex Classes

Added the `setOpportunityId(opportunityId)` method to the `Database.LeadConvert` class.

Evaluate Your Implementation with Salesforce Optimizer

Indicated that starting in April 2018, Chatter adoption in Salesforce mobile apps are no longer evaluated.

Explore Features with Trailhead

Added the Updated Modules section to indicate changes to the *Service Cloud Basics* and *Service Cloud Basics for Lightning Experience* modules.

Get Up to Date on Your Lightning Experience Readiness

Run the report after April 4 for updated advice on moving to Lightning Knowledge.

March 28, 2018

Save Time Ordering Products with Contextual Product Requests (iOS)

Added a release note on the contextual product requests feature. This feature is available immediately in v4.0 of the Field Service Lightning iOS app.

Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)

Updated the feature availability date to April 2, 2018.

See Marketing Asset Performance Directly on Campaigns (Beta)

Updated the feature availability date to April 2, 2018 and removed mention of custom reports types in the Pardot AppExchange package.

Explore Features with Trailhead

Added an announcement about a new trail: Increase Sales Efficiency with Territory Management.

Developer Hub: Manage Your Scratch Orgs

Added clarification regarding where scratch orgs get created in Public Cloud and Government Cloud Dev Hub orgs.

Connect the Dots Between Leads and Accounts

Added back the previously published release note about the Matched Leads component and the standard matching rule for leads on accounts. These features are now included in the Spring '18 release. Rollout started on March 20, 2018, and the features are available in all orgs as of March 29.

Manage User Onboarding in a Single Place

Added and announcement about new onboarding assistance and setup page for Lightning Experience.

March 21, 2018

The Visual Workflow Guide Has a New Name

Added an announcement about the *Visual Workflow Guide*'s new name: *Cloud Flow Designer Guide*.

Packaging: Unlocked Packages (Beta) with More Supported Components and Other Enhancements

Unlocked developer-controlled packages (DCPs) and locked DCPs are now referred to as unlocked packages and locked packages, respectively.

Switch to Lightning Experience with One Fewer Click

Added an announcement about the addition of a way for users to switch to Lightning Experience from the header of Salesforce Classic.

March 14, 2018

Store Certain Data Privacy Preferences

Added that person accounts can now be associated with data privacy records.

Optimize Account Roles to Improve Performance and Scale Your Org

Added details about converting existing Community accounts.

Service Cloud Essentials: Customer Service for Small-But-Mighty Businesses

Added a release note for Service Cloud Essentials.

March 7, 2018

Service Cloud Mobile (Pilot)

Added a release note for the Service Cloud Mobile pilot

Other Changes in Einstein Lead Scoring

Added details about a new filter on the Conversion Rate by Lead Score reports that excludes leads without a score from the report.

Prebuilt Apps Now Easier to Customize, Faster—plus More

Added details about new versions of Sales Analytics and Service Analytics prebuilt apps, including point-and-click customization and global filters.

Manage Outstanding Debt with Account Balance Snapshots

Added details about a new feature in Salesforce Billing called Account Balance Snapshots.

Control Access to Roles and Role Hierarchy with a New Permission

Clarified how users can access role data with the new View Roles and Role Hierarchy permission.

Metadata API

Added information about the new `referrerPolicy` field on the `SecuritySettings` type.

Clean Up Unsuccessful Invoice Runs

Added information on the new CleanUp button used in Salesforce Billing Invoice Runs.

New Formula Functions

Added information about several new formula functions.

Get All Metadata API Entities with Expanded Source Tracking (Beta)

Added the metadata types that are supported with Expanded Source Tracking.

Salesforce CLI: New Commands and Easier Installation

Removed `--buildinstance` as a supported option for the `force:package2:version:create` command.

February 28, 2018

Get Up to Date on Your Lightning Experience Readiness

Added details about the February 2018 Readiness Check release, including a summary section redesign, readiness statuses, and customized content for Premier and Signature Success Plan customers.

Metadata API

Added new fields to the Dashboard metadata type.

See Marketing Asset Performance Directly on Campaigns (Beta)

Added information about new marketing asset objects and clarified which features are available only in Lightning Experience.

Send Actions Setup Page is Available in Lightning Experience

Updated the title for clarity.

Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)

Added note that the feature becomes available on March 20, 2018.

Grow Your Business Faster with the AppExchange Trailblazer Scorecard

Added an announcement about the AppExchange Trailblazer Scorecard.

Implement Advanced Authentication for Android Users of Custom Domains

Added a release note about support for advanced authentication for Salesforce app and Mobile SDK users on Android devices.

Connected App IP Relaxation Policy Label Is Easier to Understand

Added a release note about a name change for the relax IP restrictions with second factor policy.

Create and Personalize Partner Campaigns with Distributed Marketing

Updated from Pilot to Generally Available.

February 21, 2018

@Mention Privacy in Private Groups

Added a release note about a new notification that displays when mentioning other groups on a post in a private group.

Get All Metadata API Entities with Expanded Source Tracking (Beta)

Added an announcement about the Salesforce DX Expanded Source Tracking beta.

Evaluate Your Implementation with Salesforce Optimizer

Added an announcement about Salesforce Optimizer updates.

Change in User Impact Counts for the Readiness Check

Starting in February 2018, your Readiness Report counts only some types of user licenses in user impact.

Salesforce URLs No Longer Appear in Google Search Results

Added a release note about Salesforce URLs no longer appearing in search results.

Sandboxes Use Lowercase My Domain Hostnames

Added a release note explaining that sandboxes for production orgs created in Spring '18 now have lowercase My Domain hostnames.

Matched Leads Component and Standard Matching Rule for Leads on Accounts Removed from Spring '18 Release

Removed the release note "Connect the Dots Between Leads and Accounts." The Matched Leads component and the matching rule for leads on accounts were not included in the Spring '18 release. For more information, contact Salesforce.

February 14, 2018

See Marketing Asset Performance Directly on Campaigns (Beta)

Added beta disclaimer and information about the differences between the Engagement History related list and Engagement History component available for lead and contact detail pages.

What's New in Salesforce for Android and iOS

Announcing the general availability on the week of 2/12/2017 for version 15.0 of Salesforce for Android and iOS. Learn all about the new enhancements for your users.

You Asked for It!

Added Ideas that we delivered.

Salesforce Integrations: Let Users Add WebEx Meetings to Salesforce Events

Clarified that admins use the Lightning App Builder to add the Cisco WebEx Composer component to an event record only when creating a custom event record.

Handle Invalid Connections in Streaming API

Added an example of an error response message for the /meta/handshake channel.

Force.com IDE 2 Beta Discontinued

Added a release note announcing the discontinuation of the Force.com IDE 2 beta.

AppExchange: More Payment Options and Enhanced Installs

Added a release note about a new notification that displays during installation for packages that aren't authorized by the AppExchange Partner Program.

Alert Users Before They're Redirected Outside Salesforce**Metadata API**

Clarified that the redirect warning displays only when users click links in Web Tabs.

Package Approval Status Displays Before Installation

Added a release note about a new notification that displays during installation if the AppExchange Partner Program hasn't authorized your package for distribution.

Explore Features with Trailhead

Added a new Trailhead module, Channel Order App Basics.

Create PDF Files and Print Your Einstein Analytics Dashboards

Added a release note for the new print action on dashboards.

Set Different Login Policies for Salesforce and Community Users (Beta)

Added that Salesforce admins can't create communities after enabling this option on their profile.

Trigger Custom Application Logic When Users Log Out (Beta)

Added a release note about the beta version of the LogoutEventStream object.

Org Shape for Scratch Orgs Pilot Has Been Suspended

Removed information regarding how to sign up for the Org Shape for Scratch Orgs pilot. Due to outstanding bugs, we aren't accepting any new pilot participants.

February 7, 2018

See Marketing Asset Performance Directly on Campaigns (Beta)

Added beta disclaimer.

Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)

Added beta disclaimer and clarified location of opt-in settings.

See Numbers Dialed in Call History

Added new feature for Spring '18 release.

Record Messages with Better Audio Quality

Added new feature for Spring '18 release.

Flow

Added a new enumerated value on the `actionType` field on the FlowActionCall subtype.

Track Encryption in Email Logs

Added two fields to the email log to expose the TLS version and cipher and track whether the encryption certificate was verified.

Tooling API New and Changed Objects

Added two new first- and second-generation packaging objects, PackageInstallRequest and SubscriberPackageVersion.

Supercharge Your Productivity with Personalized Navigation in Lightning Experience

Added information about disabling personalized navigation.

Let Users Delete Data in Custom Big Objects

Updated code samples.

Delete Field History and Field Audit Trail Data

Updated code samples.

Salesforce for Outlook: Bug Fixes Available

Salesforce for Outlook v3.4.2 release notes are available.

Save Time by Cloning Sandboxes (Beta)

Added a release note for the Sandbox Cloning beta, which begins on Monday, February 12, 2018.

Code Smarter with Salesforce Extensions for VS Code

Added a release note that highlights some recent changes to the Salesforce Extensions for VS Code extension pack for Visual Studio Code.

Service Cloud Essentials: Customer Service for Small-But-Mighty Businesses

We removed this entry from the release notes. Service Cloud Essentials is no longer currently available.

Validation for Component Attribute Types

Added an example of a validation failure.

Set Third-Party Account Links Via the API

Added note about contacting Salesforce Customer Support to enable this feature.

Create Partner Edition Scratch Orgs

Partners can create scratch orgs based on these partner-specific editions: Partner Developer, Partner Enterprise, Partner Group, and Partner Professional. This feature is available when Salesforce CLI v42 is released on February 10, 2018.

Salesforce CLI: New Commands and Easier Installation

Added a release note that highlights the new and changed features in the Salesforce CLI. These features are available when Salesforce CLI v42 is released on February 10, 2018.

Get the Right Work to the Right Agent, Right Away, with Skills-Based Routing (Beta)

Added See Also link to the product documentation.

Sharing Sets for All Customer and Partner Licenses—Pilot

Added a release note about sharing sets being available for all customer and partner Licenses as a pilot feature.

Let Supervisors See Only What Matters in Omni-Channel Supervisor (Beta)

Admins now can access the Supervisor Configurations (beta) setup page without contacting Support.

Handle Invalid Connections in Streaming API

Updated information about the authentication validation interval.

Access and Manipulate IoT Components with the Salesforce IoT REST API

Added a See Also link to the Salesforce IoT REST API documentation.

Changed Objects

A new field, `CampaignImageId`, was added to the Campaign object.

Get Record Detail Information at a Glance

Added a release note that highlights improvements to the Record Detail component.

Subscribe to Dashboards to Schedule Refreshes and Get Email Updates

Added a user permissions table to the release note, and updated the feature impact table to indicate that administrator setup is required.

Reports and Dashboards REST API

Fixed a typo in the New Resources and Parameters section.

Dashboards: Better Tables, Subscriptions, and New Design Options

Updated animated GIFs to correctly show the View Report links in dashboard components.

Subscribe to Dashboards to Schedule Refreshes and Get Email Updates

Clarified that admins use the Lightning App Builder to add the Cisco WebEx Composer component to an event record only when creating a custom event record.

Filter Encrypted Data with Deterministic Encryption Using Exact, Case-Sensitive Matching (Beta)

Updated the indexes that the deterministic encryption scheme supports.

January 25, 2018

Leverage Person Accounts for Financial Services Cloud

Updated to reflect changes in delivery strategy.

Metadata API

Added information about the new `redirectionWarning` field on the SecuritySettings type.

January 24, 2018

Release Note Changes, Use Hashtags in Polls, Add Hashtags to Polls

Removed statements about Thanks being available in Lightning Experience.

New, Changed, and Deprecated Calls, Metadata API, Tooling API New and Changed Objects

Updated the ActionOverride entries for the SOAP, Metadata, and Tooling APIs to add that the `Small` value for the `FormFactor` field now also applies to the tablet format.

Help and Training

Added new Trailhead modules, videos, walkthroughs, and compliance documentation to the Help and Training section.

Changes in Locker Service

Release notes for Locker Service were added.

Validation for Component Attribute Types

Lightning component attribute types are validated at save time.

Tooling API New and Changed Objects

The Status field of PackageUploadRequest has a new valid value: `Queued`.

Gather Feedback from Your Community with the Survey Component

We made a correction to the dates that the Survey component is available for customers. The Survey component is available in the Spring '18 release.

Changed Apex Classes

The `getTemplateName()` method in the `Messaging.SingleEmailMessage` class doesn't take an argument.

Supercharge Your Productivity with Personalized Navigation in Lightning Experience

Added information about how to avoid opening temporary tabs.

Give All Sales Cloud Einstein Users Access to the Sales Analytics App

Clarified that Sales Cloud Einstein now comes with the Sales Analytics app, which includes the Einstein dashboards.

Inbox: Scheduling Improvements, Email Tracking, and Productivity Updates

Added more Inbox improvements like full page layout, read receipts, and insert availability.

Connect for Office: Update Required and End of Support for Microsoft® Word 2007

Connect for Office v1.8.1.7 is now available for download. In addition, due to security requirements, the Microsoft Word add-in is no longer available for Word 2007 users.

<apex:slds> Supports Lightning Experience and Custom Styling

The `<apex:slds>` component adopts the latest Lightning Experience styling and supports custom themes.

Enable the Lightning Console UI Theme (Critical Update)

A Spring '18 critical update enables the Lightning Console UI Theme.

Fine-Tune Account and File Search Results with Filters

Added "number" to the list of field types that can't be filtered for Accounts. Also clarified that users should be as specific as possible with their initial search term.

Salesforce Authenticator: Improved Communication and Activity Tracking

Added information about Authenticator v.2.11 features.

Set Different Login Policies for Salesforce and Community Users (Beta)

Added Beta feature considerations.

January 17, 2018

Tooling API New and Changed Objects

Added four new objects: `DataIntegrationRecordPurchasePermission`, `DuplicateJobDefinition`, `DuplicateJobMatchingRuleDefinition`, and `MatchingRule`.

Schedule a Security Assessment on Salesforce Environments Before Testing

Before you run vulnerability and penetration tests on Salesforce environments, request approval for and schedule a security assessment.

Popup Helps You and Your Users Adopt Lightning Experience

Added information about a prompt to try Lightning Experience.

New and Changed Lightning Components

Added new attributes for lightning:inputRichText and that the name attribute is no longer required for these components: lightning:combobox, lightning:dualListbox, lightning:fileUpload, lightning:input, lightning:radioGroup, lightning:select, and lightning:textarea.

Use Named Credentials with JSON connections in CMS Connect (Beta)

Announced new capability for CMS Connect (JSON).

Connect to More Data with New Connectors and Revised Limits

Added note stating that new connectors are available on a rolling basis during the Spring '18 release.

Improve Security with Stricter Requirements When Logging In as a Community or Portal User (Critical Update)

We removed this entry from the release notes. This feature is no longer available in the Spring '18 release.

January 10, 2018

<style> Tag Not Allowed in Components

You can't add a <style> tag in component markup or when you dynamically create a component in JavaScript code.

Tooling API New and Changed Objects

Added two new fields to the EmbeddedServiceLiveAgent object.

New Standard Objects

Added new OrgDeleteRequest object.

Automatically Remove Content After a Specific Time

We removed this entry from the release notes. This feature is no longer available in the Spring '18 release.

Send Actions Setup Page is Available in Lightning Experience

Changed the title of the topic and clarified support.

Include Encrypted Fields in Matching Rules Used in Duplicate Management (Beta)

Changed the title to clarify that both standard and custom matching rules can reference encrypted fields.

December 27, 2017

Get Started with Omni-Channel in Lightning Experience with a New Setup Flow

Announced the new Omni-Channel setup flow.

New Orgs Get an Improved OData 2.0 Adapter for Salesforce Connect

Announced improvements to the OData 2.0 adapter that apply only to orgs created in Spring '18.

Track External Object Data Callouts with Event Log Files (Pilot)

Specified which fields in External OData Callout events aren't supported for the OData 2.0 adapter on orgs created before Spring '18.

Test-Drive Deterministic Encryption Using Exact, Case-Insensitive Matching (Pilot)

Specified the environments this pilot supports.

Build Natural Language Processing into Your Apps with Einstein Language

Einstein Intent and Einstein Sentiment are now generally available.

December 18, 2017

Salesforce Spring '18 Release Notes

Published preview release notes.

Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback form and vote up or down. Add comments if you have them.
- **Twitter**—When you follow @salesforcedocs on Twitter, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Tweet us at [@salesforcedocs](#).

How and When Do Features Become Available?

Some features in Spring '18 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

We've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers for Lightning Experience	<input checked="" type="checkbox"/>			
Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11			<input checked="" type="checkbox"/>	
Supported Browsers for Salesforce Classic	<input checked="" type="checkbox"/>			

Salesforce Overall

Personalize your app's navigation bar to suit the unique way you work. Explore the new themes, macros, and quick text. Create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. Lightning Console Apps has something new for every admin, agent, and developer. Filters arrive to Account and File search results. And regardless of the regulations and policies with which you're complying for data protection and privacy, we give you guidance in evaluating the best way to meet your requirements.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Get Guidance for Data Protection and Privacy Regulations	<input checked="" type="checkbox"/>			
Store Certain Data Privacy Preferences			<input checked="" type="checkbox"/>	
Supercharge Your Productivity with Personalized Navigation in Lightning Experience	<input checked="" type="checkbox"/>			
Show Your True Colors with Themes in Lightning Experience		<input checked="" type="checkbox"/>		
Gather Feedback with Salesforce Surveys (Generally Available)			<input checked="" type="checkbox"/>	
Enable the New URL Format for Lightning Experience and the Salesforce Mobile App (Critical Update)			<input checked="" type="checkbox"/>	
Boost Productivity with Quick Text and Macros			<input checked="" type="checkbox"/>	
Get Record Detail Information at a Glance		<input checked="" type="checkbox"/>		
Console				
Use Web Tabs to Display Third-Party Content in the Lightning Console		<input checked="" type="checkbox"/>		
Use Classic Console Integration Toolkit Methods in Lightning Experience		<input checked="" type="checkbox"/>		
Override Lightning Component Actions in Lightning Console Apps		<input checked="" type="checkbox"/>		
Copy and Share Subtab and Workspace URLs Using Keyboard Shortcuts		<input checked="" type="checkbox"/>		
Use Visualforce URLs in Lightning openTab and openSubtab Methods		<input checked="" type="checkbox"/>		
Enable the Lightning Console UI Theme (Critical Update)		<input checked="" type="checkbox"/>		
Detect the Lightning Console UI Theme in Visualforce Pages		<input checked="" type="checkbox"/>		
Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again			<input checked="" type="checkbox"/>	
Supercharge Console Productivity with Quick Text and Macros			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Reduce the Noise on Your Console Pages with Collapsible Sections			<input checked="" type="checkbox"/>	
Search				
Fine-Tune Account and File Search Results with Filters	<input checked="" type="checkbox"/>			
See More Relevant Objects First in Top Results	<input checked="" type="checkbox"/>			
Get Search Results for More Objects		<input checked="" type="checkbox"/>		
Get Up to Date on Your Lightning Experience Readiness		<input checked="" type="checkbox"/>		
Change in User Impact Counts for the Readiness Check		<input checked="" type="checkbox"/>		
Deactivate Orgs You Don't Use				
View Help Topics Wherever You Are in Lightning Experience	<input checked="" type="checkbox"/>			
Popup Helps You and Your Users Adopt Lightning Experience	<input checked="" type="checkbox"/>			
Manage User Onboarding in a Single Place	<input checked="" type="checkbox"/>			
Choose to Send Contact Information with Your Feedback	<input checked="" type="checkbox"/>			
Switch to Lightning Experience with One Fewer Click	<input checked="" type="checkbox"/>			
The Global Actions Menu Has New Header Text	<input checked="" type="checkbox"/>			
Evaluate Your Implementation with Salesforce Optimizer			<input checked="" type="checkbox"/>	

Sales

Get smarter with Einstein Forecasting and Einstein Opportunity Scoring. Use LinkedIn as a source for lead generation. Help reps be more efficient with call monitoring in Lightning Dialer, improved list email, and other tools.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Sales Cloud Einstein				
Einstein Readiness Assessor			<input checked="" type="checkbox"/>	
Einstein Opportunity Scoring			<input checked="" type="checkbox"/>	
Prioritize Your Way to More Business (Generally Available)			<input checked="" type="checkbox"/>	
Set Up Einstein Opportunity Scoring (Generally Available)			<input checked="" type="checkbox"/>	
Einstein Forecasting				
Get More Certainty and Visibility into Your Forecasts (Beta)			<input checked="" type="checkbox"/>	
Set Up Einstein Forecasting (Beta)			<input checked="" type="checkbox"/>	
Einstein Lead Scoring				
See the Most Relevant Reasons Behind Each Score	<input checked="" type="checkbox"/>			
Get the Rank and Department of Each Lead	<input checked="" type="checkbox"/>			
Other Changes in Einstein Lead Scoring	<input checked="" type="checkbox"/>			
Einstein Activity Capture				
Send Emails from Org-Wide Email Addresses			<input checked="" type="checkbox"/>	
See Automatically Captured Microsoft® Exchange 2016 and 2013 Events from Salesforce Calendar	<input checked="" type="checkbox"/>			
Sales Cloud Einstein Setup				
Sales Cloud Einstein Analytics				
Give All Sales Cloud Einstein Users Access to the Sales Analytics App	<input checked="" type="checkbox"/>			
Update the Einstein Automated Contacts Dashboard			<input checked="" type="checkbox"/>	
Update the Einstein Lead Scoring Dashboard			<input checked="" type="checkbox"/>	
Einstein Insights				
Inbox				
Core Sales Features				
Leads				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Generate Leads from LinkedIn			<input checked="" type="checkbox"/>	
Streamline Lead Conversion Without Opportunities			<input checked="" type="checkbox"/>	
Campaigns				
Add Campaign Members Faster	<input checked="" type="checkbox"/>			
Use Path to Track Campaign Progress			<input checked="" type="checkbox"/>	
Report on Customizable Campaign Influence	<input checked="" type="checkbox"/>			
Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)			<input checked="" type="checkbox"/>	
See Marketing Asset Performance Directly on Campaigns (Beta)			<input checked="" type="checkbox"/>	
Path	<input checked="" type="checkbox"/>			
Accounts				
Use Path to Build Relationships with Accounts			<input checked="" type="checkbox"/>	
Access an Account's Hierarchy More Easily	<input checked="" type="checkbox"/>			
Connect the Dots Between Leads and Accounts			<input checked="" type="checkbox"/>	
Opportunities				
Share Credit for a Deal in Lightning Experience	<input checked="" type="checkbox"/>			
See a Product's Entire Name	<input checked="" type="checkbox"/>			
Find the Right Price Book the First Time	<input checked="" type="checkbox"/>			
Add Account Team Members to Opportunity Teams	<input checked="" type="checkbox"/>			
Products				
Create More Bells and Whistles on Products	<input checked="" type="checkbox"/>			
Add Products to Price Books Faster	<input checked="" type="checkbox"/>			
Enterprise Territory Management				
Contacts				
Update Contact Roles Like a Speed Demon	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Locate a Contact's Hierarchy in a Snap	<input checked="" type="checkbox"/>			
Productivity Features				
Sales Console			<input checked="" type="checkbox"/>	
Lightning Dialer				
Coach Your Sales Reps with Call Monitoring (Beta)			<input checked="" type="checkbox"/>	
Set Up Call Monitoring (Beta)			<input checked="" type="checkbox"/>	
Disable Click-to-Call with the Do Not Call Field			<input checked="" type="checkbox"/>	
See Numbers Dialed in Call History	<input checked="" type="checkbox"/>			
Record Messages with Better Audio Quality	<input checked="" type="checkbox"/>			
Inbox				
Use Full Page Layouts to Create Records	<input checked="" type="checkbox"/>			
Schedule Meetings on Behalf of Others	<input checked="" type="checkbox"/>			
Schedule Meetings Easier By Seeing Who's Free	<input checked="" type="checkbox"/>			
See Who's Engaging with Email	<input checked="" type="checkbox"/>			
Prevent Read Receipts to Enhance Privacy			<input checked="" type="checkbox"/>	
Predict Priorities with Einstein Email Insights			<input checked="" type="checkbox"/>	
Email Experience				
Increase Your Efficiency by Managing List Emails in One Place	<input checked="" type="checkbox"/>			
Edit Email Signatures Before Sending a List Email		<input checked="" type="checkbox"/>		
Review How Many List Emails You Can Send	<input checked="" type="checkbox"/>			
Email Person Accounts Faster	<input checked="" type="checkbox"/>			
Send Emails with Predefined Recipients		<input checked="" type="checkbox"/>		
Cross Email Spell-Check off Your To-Do List	<input checked="" type="checkbox"/>			
Save Time Creating Emails	<input checked="" type="checkbox"/>			
Track Encryption in Email Logs	<input checked="" type="checkbox"/>			
Activity Timeline				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Adjust the Number of Activities on the Activity Timeline	<input checked="" type="checkbox"/>			
Dive Deep with Expanding Einstein Emails in the Activity Timeline	<input checked="" type="checkbox"/>			
Activity Reminders				
Don't Forget to Remember with Event Reminders			<input checked="" type="checkbox"/>	
Fine-Tune Activity Reminders	<input checked="" type="checkbox"/>			
Clear All Reminders at Once	<input checked="" type="checkbox"/>			
Calendar and Events				
Automatically Relate Important Meetings to Contacts and Leads			<input checked="" type="checkbox"/>	
Give More Reps Access to Attendees			<input checked="" type="checkbox"/>	
Work with Coworkers' Events More Easily in Lightning Experience	<input checked="" type="checkbox"/>			
Add to Outlook Button Is Now Export Events	<input checked="" type="checkbox"/>			
Home				
Data Quality				
Stay on Top of Duplicate Records by Using Duplicate Jobs (available within 24 hours after the release)			<input checked="" type="checkbox"/>	
Use Discover Companies to Put a Treasure Trove in Your Sales Pipeline (available within 24 hours after the release)			<input checked="" type="checkbox"/>	
Google Integration				
Lightning for Gmail				
Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts			<input checked="" type="checkbox"/>	
Get More Context in Chatter Notification Emails			<input checked="" type="checkbox"/>	
Focus Work with Einstein Opportunity Scores and Insights in Gmail			<input checked="" type="checkbox"/>	
Let Lightning for Gmail Do Your Typing			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Lightning Sync for Google				
Sync Events from Salesforce to Google Calendar™ Only			<input checked="" type="checkbox"/>	
Sync Person Accounts with Google Contacts			<input checked="" type="checkbox"/>	
Give More Google Users Access to Attendees			<input checked="" type="checkbox"/>	
Manage Lightning for Gmail and Lightning Sync Settings Easily		<input checked="" type="checkbox"/>		
Microsoft® Integration				
Lightning for Outlook				
Pin Lightning for Outlook Open When Composing Emails			<input checked="" type="checkbox"/>	
Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts			<input checked="" type="checkbox"/>	
Get More Context in Chatter Notifications			<input checked="" type="checkbox"/>	
Focus Work with Einstein Opportunity Scores and Insights in Microsoft® Outlook®			<input checked="" type="checkbox"/>	
Let Lightning for Outlook Do Your Typing			<input checked="" type="checkbox"/>	
Lightning Sync for Microsoft® Exchange®				
Sync Events Both Ways for Reps on Microsoft® Exchange 2013 and 2016			<input checked="" type="checkbox"/>	
Sync Events from Salesforce to Microsoft® Exchange Only			<input checked="" type="checkbox"/>	
Sync Person Accounts with Microsoft® Contacts			<input checked="" type="checkbox"/>	
Give More Microsoft® Exchange Users Access to Attendees			<input checked="" type="checkbox"/>	
Manage Lightning for Outlook and Lightning Sync Settings Easily		<input checked="" type="checkbox"/>		
Salesforce for Outlook				
Connect for Office				
Salesforce CPQ and Billing				
Salesforce CPQ				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Choose Multiple Lines in Salesforce CPQ Visualforce Pages			<input checked="" type="checkbox"/>	
Track Contracting Job Status			<input checked="" type="checkbox"/>	
Other Changes in Salesforce CPQ	<input checked="" type="checkbox"/>			
Salesforce Billing				
Customize Billing with Dynamic Invoice Plans			<input checked="" type="checkbox"/>	
Create Accurate Invoices for Canceled Orders				
Manage Tax for Your Credit Notes and Debit Notes			<input checked="" type="checkbox"/>	
Use New Reports to View Account Status			<input checked="" type="checkbox"/>	
Manage Payments Seamlessly in the New Payment Center			<input checked="" type="checkbox"/>	
Add Flexibility with Prerated Usage for Order Products			<input checked="" type="checkbox"/>	
Manage Outstanding Debt with Account Balance Snapshots				
Clean Up Unsuccessful Invoice Runs				
Pardot				
Pardot Available in Japanese	<input checked="" type="checkbox"/>			
Secure Tracker Domains with SSL			<input checked="" type="checkbox"/>	
Sync Users from Salesforce to Pardot		<input checked="" type="checkbox"/>		
Other Changes in the Sales Cloud				
Forecasts Grid Column Widths Are Adjustable in Lightning Experience	<input checked="" type="checkbox"/>			
New Permission Required to Access the Forecasts Page in Lightning Experience			<input checked="" type="checkbox"/>	
UK and Ireland Contact Data Removed from Data.com Connect	<input checked="" type="checkbox"/>			
Zero Quantity Order Lines Allowed on Order Products	<input checked="" type="checkbox"/>			

Service

Build a stellar customer service experience with Service Cloud Essentials, a new edition of Service Cloud tailored to the needs of small businesses. Boost your Knowledge efforts with export functions, article sharing, and translation approval processes, and incorporate the Knowledge component into your Live Agent implementation. Track field service product returns and repairs with the help of return orders, get up to speed quickly with a new guided setup, and customize the Field Service Lightning mobile app experience by user profile. Enjoy mass quick actions for cases and leads, macro support for all objects, and a more powerful Snap-ins SDK. Finally, take advantage of a host of improvements to Service Cloud in Lightning Experience, including quick text support, a dressed-up social conversation sidebar, and a richer Live Agent experience.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Service Cloud Essentials			<input checked="" type="checkbox"/>	
				Knowledge
Insert Article Content into Case Emails			<input checked="" type="checkbox"/>	
Set Up Draft Approval in Lightning			<input checked="" type="checkbox"/>	
Reassign Drafts to New Assignees			<input checked="" type="checkbox"/>	
Give Live Agent Users Access to Knowledge			<input checked="" type="checkbox"/>	
Import Translation Files with Ease			<input checked="" type="checkbox"/>	
				Field Service
Track Product and Inventory Returns with Return Orders			<input checked="" type="checkbox"/>	
Filter Related Lists on Service Reports (Beta)			<input checked="" type="checkbox"/>	
View, Email, and Delete Service Reports in Lightning Experience	<input checked="" type="checkbox"/>			
Add Page Numbers to Service Reports			<input checked="" type="checkbox"/>	
View and Manage Service Crews in the Salesforce App			<input checked="" type="checkbox"/>	
Create Service Resources for Omni-Channel Support Agents (Beta)				<input checked="" type="checkbox"/>
Field Service Managed Package				
Schedule Service Crews			<input checked="" type="checkbox"/>	
Get Field Service on the Road with Guided Setup			<input checked="" type="checkbox"/>	
Tune Your Field Service Efficiency			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Select the Right Resource Faster			<input checked="" type="checkbox"/>	
Field Service for Mobile				
Speed Up Service with Enhanced Flows (iOS & Android)			<input checked="" type="checkbox"/>	
Customize Mobile App Settings for Different Users (iOS & Android)			<input checked="" type="checkbox"/>	
Consume Products from Multiple Locations (iOS) (Beta)			<input checked="" type="checkbox"/>	
Control Which Users Can Edit Their Inventory (iOS)			<input checked="" type="checkbox"/>	
Upload Images in Flows (iOS)			<input checked="" type="checkbox"/>	
Take Control of Your Service Reports with Filters (iOS)			<input checked="" type="checkbox"/>	
Control Lookup Fields with Search Layouts (iOS)			<input checked="" type="checkbox"/>	
Customize Resource Absences (iOS)			<input checked="" type="checkbox"/>	
Save Time Ordering Products with Contextual Product Requests (iOS)			<input checked="" type="checkbox"/>	
Productivity				
Quick Text		<input checked="" type="checkbox"/>		
Macros Support			<input checked="" type="checkbox"/>	
Updated Macros Utility		<input checked="" type="checkbox"/>		
Use Email Templates and Attachments in Macros		<input checked="" type="checkbox"/>		
Use Quick Text in Macros		<input checked="" type="checkbox"/>		
Macros Utility Shortcut		<input checked="" type="checkbox"/>		
Macro Builder Enhancements		<input checked="" type="checkbox"/>		
Cases				
Mass Quick Actions in Lightning Experience			<input checked="" type="checkbox"/>	
Email Search has Finally Arrived		<input checked="" type="checkbox"/>		
Reply and Forward Email		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Email Default Publisher is Now HTML			<input checked="" type="checkbox"/>	
Case Path for Lightning Experience			<input checked="" type="checkbox"/>	
Send Actions Setup Page is Available in Lightning Experience		<input checked="" type="checkbox"/>		
Console				
Service Console Enhancements			<input checked="" type="checkbox"/>	
Lightning Flow for Service				<input checked="" type="checkbox"/>
Get Started with Omni-Channel in Lightning Experience with a New Setup Flow			<input checked="" type="checkbox"/>	
Service Setup Flow for Knowledge			<input checked="" type="checkbox"/>	
Live Agent				
Chat Faster with Quick Text in Lightning Experience	<input checked="" type="checkbox"/>			
Chat Smarter with Lightning Knowledge			<input checked="" type="checkbox"/>	
Delete Waiting Chat Transcripts	<input checked="" type="checkbox"/>			
Seamless Releases for Chats	<input checked="" type="checkbox"/>			
Omni-Channel				
Get the Right Work to the Right Agent, Right Away, with Skills-Based Routing (Beta)				<input checked="" type="checkbox"/>
Use External Routing (Beta) in Lightning Experience				<input checked="" type="checkbox"/>
Monitor Your Support Center with Omni-Channel Supervisor in Lightning Experience (Generally Available)			<input checked="" type="checkbox"/>	
Let Supervisors See Only What Matters in Omni-Channel Supervisor (Beta)				<input checked="" type="checkbox"/>
Use Triggers and Workflows Galore with Agent Work and User Service Presence			<input checked="" type="checkbox"/>	
Use Omni-Channel Console Methods and Events in Lightning Experience (Generally Available)			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Get More Done with Increased Routing Limits			<input checked="" type="checkbox"/>	
Snap-ins for Web				
Customize Pre-Chat with Lightning Components		<input checked="" type="checkbox"/>		
Route Chats to a Button Based on Pre-Chat Responses				
Be Proactive with Automated Chat Invitations			<input checked="" type="checkbox"/>	
Fill In Pre-Chat Fields for Logged-In Visitors			<input checked="" type="checkbox"/>	
Protect Customer Data Using Sensitive Data Rules				
Keep Your Post-Chat Page in the Snap-In			<input checked="" type="checkbox"/>	
Updates to Snap-Ins Setup and the Version 4.0 Code Snippet				
Snap-ins for Mobile Apps			<input checked="" type="checkbox"/>	
Entitlement Management			<input checked="" type="checkbox"/>	
Social Customer Service				
Speed Things Along with Quick Text in Your Social Posts			<input checked="" type="checkbox"/>	
Add Notes to Social Posts			<input checked="" type="checkbox"/>	
Subtract the Twitter Handle from Your Character Count			<input checked="" type="checkbox"/>	
Use Social Persona Threading Updates in Apex			<input checked="" type="checkbox"/>	
Define Case Rules and Routing Without Using Apex			<input checked="" type="checkbox"/>	
Use Social Customer Service with the Professional Edition			<input checked="" type="checkbox"/>	
CTI		<input checked="" type="checkbox"/>		
Service Cloud Mobile (Pilot)			<input checked="" type="checkbox"/>	
Other Changes				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Removed Personal Data from Web-to-Case and Web-to-Lead Emails		<input checked="" type="checkbox"/>		
View a Person Account's Assets in Lightning Experience	<input checked="" type="checkbox"/>			

Analytics

Powerful and familiar features grace the second beta release of the Lightning report builder: bucket columns, cross filters, and summary formulas. Subscribe to Lightning Experience dashboards, and give them a splash of color. Help users get started in Einstein Analytics with integrated and fun learning features. Quickly query and visualize data in a guided, natural language conversation (beta). Save views of dashboards that you've set up with your preferred selections and filters. Have Einstein analyze your report data with Einstein Data Insights (pilot).

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Lightning Experience Report Builder				
Categorize Data with Bucket Columns		<input checked="" type="checkbox"/>		
Filter Across Objects with Cross Filters		<input checked="" type="checkbox"/>		
Evaluate Report Data with Summary Formulas		<input checked="" type="checkbox"/>		
Edit Report Properties		<input checked="" type="checkbox"/>		
Filter by Role Hierarchy		<input checked="" type="checkbox"/>		
Other Enhancements to Reports in Lightning Experience	<input checked="" type="checkbox"/>			
Lightning Experience Report Builder Feature Differences and Gaps			<input checked="" type="checkbox"/>	
Dashboards				
Add Tables with Up to 10 Columns to Dashboards (Generally Available)	<input checked="" type="checkbox"/>			
Subscribe to Dashboards to Schedule Refreshes and Get Email Updates			<input checked="" type="checkbox"/>	
Color Your Dashboard Data with Themes and Palettes	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Improved Experience for Sharing Dashboard Components on Chatter	<input checked="" type="checkbox"/>			
Other Enhancements to Dashboards in Lightning Experience	<input checked="" type="checkbox"/>			
Folders				
Search for Folders with Salesforce Search	<input checked="" type="checkbox"/>			
Favorite a Folder to Find it Fast	<input checked="" type="checkbox"/>			
Chart Enhancements for Reports and Dashboards in Lightning Experience				
Einstein Analytics				
Onboarding				
Access Help Resources When and Where You Need Them	<input checked="" type="checkbox"/>			
Take a Tour Before You Explore	<input checked="" type="checkbox"/>			
Find the Right Learning Resource for Each Step of the Einstein Analytics Journey	<input checked="" type="checkbox"/>			
Increase Your Skills with Analytics Learning Adventures	<input checked="" type="checkbox"/>			
App Building				
Exploration	<input checked="" type="checkbox"/>			
Visualization and Dashboard Design	<input checked="" type="checkbox"/>			
Development and Customization		<input checked="" type="checkbox"/>		
Data Integration				
Connect to More Data with New Connectors and Revised Limits (not immediately available)		<input checked="" type="checkbox"/>		
Do More in Less Time in the Dataflow Editor	<input checked="" type="checkbox"/>			
Export Data to Einstein Discovery with the Export Transformation (Generally Available)		<input checked="" type="checkbox"/>		
Take More Control of Data Preparation with Recipe Enhancements	<input checked="" type="checkbox"/>			
Get a Better View of Your Datasets	<input checked="" type="checkbox"/>			
Prebuilt Apps				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Prebuilt Apps Now Easier to Customize, Faster—plus More	<input checked="" type="checkbox"/>			
Deliver the Right Service at the Right Time with Field Service Analytics	<input checked="" type="checkbox"/>			
Put a Charge into Your Sales Team's Performance with Sales Analytics	<input checked="" type="checkbox"/>			
Create the App You Want—Precisely—with Streamlined Service Analytics Wizard	<input checked="" type="checkbox"/>			
Einstein Discovery				
Einstein Data Insights: What Can Einstein Tell You About Your Report Data? (Pilot)				<input checked="" type="checkbox"/>
Create Einstein Discovery Datasets from Analytics Dataflows				<input checked="" type="checkbox"/>
Use UTF-8 Character Sets with Einstein Discovery			<input checked="" type="checkbox"/>	
Display Einstein Discovery Recommendations in a Salesforce Object (Pilot)				<input checked="" type="checkbox"/>

Communities

Communities get an even jauntier spring to its step with an abundance of cool features. The Community Cloud is better integrated with the Marketing Cloud with two new features. Partner communities can now take advantage of distributed marketing, which allows partners to use preconfigured customizable campaigns when marketing new programs. Lightning communities can use personalized email journeys to help onboard community members and nurture relationships. Other fabulous additions include customer communities, which can now use the Contact Support Form and Case Deflection components together to help customers find solutions to their issues before they even file a case.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Einstein Answers (Pilot)				<input checked="" type="checkbox"/>
Journey Builder in Communities		<input checked="" type="checkbox"/>		
Lightning Communities				
Update Your Lightning Community		<input checked="" type="checkbox"/>		
Build and Brand Your Community Faster		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Quickly See Which Theme Layout a Page is Based On		<input checked="" type="checkbox"/>		
Create and Manage CMS Connect (JSON) Connections and Content More Easily		<input checked="" type="checkbox"/>		
Use Named Credentials with JSON connections in CMS Connect (Beta)		<input checked="" type="checkbox"/>		
Keep Track of Events with Community Calendars		<input checked="" type="checkbox"/>		
Gather Feedback from Your Community with the Survey Component		<input checked="" type="checkbox"/>		
Help Customers Find Answers—and Deflect Cases—with Two New Components		<input checked="" type="checkbox"/>		
Fill in Contact Information in Snap-Ins Chat for Your Community Members		<input checked="" type="checkbox"/>		
Organize Your Community's Content Up to Eight Levels with Navigational Topics		<input checked="" type="checkbox"/>		
Assign Audiences to Page Components		<input checked="" type="checkbox"/>		
Use CRM Fields to Target Audiences		<input checked="" type="checkbox"/>		
Use More Components with More Templates		<input checked="" type="checkbox"/>		
Security				
Enable Community Users to Self-Deactivate			<input checked="" type="checkbox"/>	
Verify Community External Users' Identity		<input checked="" type="checkbox"/>		
Set Different Login Policies for Salesforce and Community Users (Beta)		<input checked="" type="checkbox"/>		
Sharing Sets for All Customer and Partner Licenses—Pilot				<input checked="" type="checkbox"/>
Usability and Performance Improvements				
Call Workspaces Home		<input checked="" type="checkbox"/>		
Optimize Account Roles to Improve Performance and Scale Your Org			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Create Multilingual Communities in Community Builder		<input checked="" type="checkbox"/>		
Improve SEO for Your Community Pages		<input checked="" type="checkbox"/>		
Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files (Critical Update)			<input checked="" type="checkbox"/>	
Chatter in Lightning Communities				
Add Style to Your Community Posts on the Go (Pilot)				<input checked="" type="checkbox"/>
Add Hashtags to Polls	<input checked="" type="checkbox"/>			
Get In-App Notifications for Group Mentions	<input checked="" type="checkbox"/>			
Share Links to Posts with Your Community	<input checked="" type="checkbox"/>			
Get the Top-Five Questions You're Most Qualified to Answer (Pilot)			<input checked="" type="checkbox"/>	
Likes and Upvotes Are Counted Together	<input checked="" type="checkbox"/>			
Jump to Your Community from Email Notifications			<input checked="" type="checkbox"/>	
Do More in Community Streams from Your Internal Salesforce Org (Beta)	<input checked="" type="checkbox"/>			
Get More Streamlined Updates in the Last Activity Group List	<input checked="" type="checkbox"/>			
Partner Central				
Hold Private Conversations in Your Partner Communities			<input checked="" type="checkbox"/>	
Track Partner Performance with the Partner Scorecard (Generally Available)		<input checked="" type="checkbox"/>		
Create and Personalize Partner Campaigns with Distributed Marketing		<input checked="" type="checkbox"/>		
Boost Channel Marketing ROI with Campaign Marketplace		<input checked="" type="checkbox"/>		
New Guided Setups: Channel Programs, Campaign Marketplace, and Intelligent Sales Enablement				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Empower Channel Marketers by Sharing Preapproved Campaigns with Partners		<input checked="" type="checkbox"/>		
Manage Channel Membership and Measure Partner Performance		<input checked="" type="checkbox"/>		
Empower Your Sales Teams with Intelligent Sales Enablement		<input checked="" type="checkbox"/>		
Community Analytics				
Know How Well Your Community Deflects Cases		<input checked="" type="checkbox"/>		
Feel Your Community's Vibe with the Sentiment Analysis Dashboard (Pilot)				<input checked="" type="checkbox"/>
Files in Communities				
Navigate Libraries with the Libraries Component (Generally Available)		<input checked="" type="checkbox"/>		
Allow Standard Users to Create Assets			<input checked="" type="checkbox"/>	
Collaborate with Community Members with Quip			<input checked="" type="checkbox"/>	
Preview Files on the Go			<input checked="" type="checkbox"/>	
Create Asset Files for Unauthenticated Users			<input checked="" type="checkbox"/>	
Upload Files with the File Upload Component and Cloud Flow Designer		<input checked="" type="checkbox"/>		
Skip Triggers and Validation Rules on Asset Files			<input checked="" type="checkbox"/>	
Delete Stored Credentials for Connected Sources			<input checked="" type="checkbox"/>	
Other Changes in Communities				
Automate More Tasks with Process Builder and Workflow Rules		<input checked="" type="checkbox"/>		
Use Custom Mass Actions in the Engagement Queue		<input checked="" type="checkbox"/>		
Data Retention Shortened for Einstein Spam Detection (Pilot)		<input checked="" type="checkbox"/>		
Member Profile Component Now Called Member Profile and Settings		<input checked="" type="checkbox"/>		

Chatter

The What I Follow feed is focused on who you actually follow. When people mention one of your groups, you can get an in-app notification. Easily share a link to a post.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Feeds				
Follow What You Follow	✓			
Get In-App Notifications for Group Mentions	✓			
Share Links to Posts	✓			
Apply a Filter and Make It Stick	✓			
Do More in Community Streams from Your Internal Salesforce Org (Beta)	✓			
Work with a Streamlined List of Rich Link Preview Domains	✓			
Get Improved Performance with Optimized Chatter User Email Digests	✓			
@Mention Privacy in Private Groups	✓			
Other Changes in Chatter				
Get More Streamlined Updates in the Last Activity Group List	✓			
Automate Chatter Tasks with Process Builder and Workflow Rules		✓		
Use Hashtags in Polls	✓			
Chatter Messenger Is Being Retired in Spring '18	✓			
Chatter Desktop Is Being Retired in Summer '18	✓			

Files

Give your team a way to preview files on the go. Quickly access your most recent asset files, allow standard users to create assets, and provide customers with a way to create asset files that unauthenticated users can access. Flow is a new way to use the File Upload component. Add library members from the Files Home tab with the new Library Member Management feature. Use the Quip Guided setup to integrate Quip and Salesforce.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Access Files with the View List of Assets			<input checked="" type="checkbox"/>	
Allow Standard Users to Create Assets			<input checked="" type="checkbox"/>	
Create Asset Files for Unauthenticated Users			<input checked="" type="checkbox"/>	
Preview Files on the Go	<input checked="" type="checkbox"/>			
Add Library Members with Library Member Management (Beta)			<input checked="" type="checkbox"/>	
Set Up Quip for Better Integration with Salesforce			<input checked="" type="checkbox"/>	
Integrate Quip			<input checked="" type="checkbox"/>	
Upload Files from a Flow			<input checked="" type="checkbox"/>	
Skip Triggers and Validation Rules on Asset Files			<input checked="" type="checkbox"/>	

Mobile

Salesforce mobile apps help your users stay productive throughout their busy days, no matter where they are. So we've been hard at work adding new ways to help your users outside of the office. Salesforce offers improvements to Chatter and many other sales features, so sales professionals can take care of even more business from their phones.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
What's New in Salesforce for Android and iOS	<input checked="" type="checkbox"/>			
Everything That's New in the Salesforce App				
Run Salesforce on Your iPhone X	<input checked="" type="checkbox"/>			
New Search Experience in Salesforce for iOS	<input checked="" type="checkbox"/>			
See Einstein Insights About Your Accounts and Opportunities (Pilot)	<input checked="" type="checkbox"/>			
See More on the Go with Enterprise Territory Management	<input checked="" type="checkbox"/>			
Access and Collaborate in the Quip App	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Legacy Charts for Salesforce Mobile Retire in Spring '18	✓			
Add Style to Posts and Comments on the Go (Pilot)	✓	✓	✓	
Get Push Notifications for Group Mentions	✓	✓	✓	
Feeds Tab Renamed on Your Mobile Devices	✓	✓	✓	
Share Content with the New Chatter Post Composer	✓	✓	✓	
Enjoy a Modern Chatter Experience in Salesforce for Android	✓	✓	✓	
View Inline Images and Multiple Attachments in the Chatter Feed	✓	✓	✓	
Access Your Custom Feeds with Chatter Streams	✓			
Create Shortcuts to Your Top Salesforce Pages with Favorites	✓			
Upload Files with the File Upload Component and Cloud Flow Designer				
Animate Your Messages with Third-Party Keyboards	✓	✓	✓	
Salesforce Authenticator	✓			

Financial Services Cloud

Users can quickly capture what's top of mind for their customers, whether it's retirement savings or a savings account, and see it all on the client profile with the Client Expressed Interests component. Upload large batch sizes lickety-split with Accelerated Data Loads, our enhancements to bulk uploads. Plus, you can leverage person accounts in Financial Services Cloud. And there's more—keep reading!

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Capture and View Customer Needs with the Client Expressed Interests Component				
Upload Faster with Accelerated Data Loads				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Leverage Person Accounts for Financial Services Cloud				
Usability and Other Enhancements to Financial Services Cloud				
New Custom Fields for Financial Services Cloud Objects				

Health Cloud

With goals decoupled from problems, you can use the Health Cloud data model in the way that's right for you. Health Cloud helps you identify gaps in a patient's care, and you can gather survey information to help manage your patients more efficiently.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Customize Care with Flexible Care Plans		<input checked="" type="checkbox"/>		
Track Care Gaps to Improve Care Coordination		<input checked="" type="checkbox"/>		
Use Assessments to Gather Patient Information			<input checked="" type="checkbox"/>	

Customization

While you're making your Home and App pages more dynamic, modify your Lightning apps with the same tool: the Lightning App Builder. Make your flows more awesome by embedding custom Lightning components in your screens and showing users which stage of the flow they're at. Start tracking time-only data with the new Time field type.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Lightning App Builder				
Edit Lightning Apps with the Lightning App Builder		<input checked="" type="checkbox"/>		
Manage Your Lightning Pages Inside the Lightning App Builder		<input checked="" type="checkbox"/>		
Make Your Lightning App and Home Pages Dynamic		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Include Related Fields and Other Objects in Component Visibility Rules		<input checked="" type="checkbox"/>		
See Assigned Apps on App Page Detail Pages		<input checked="" type="checkbox"/>		
Organize Components into Collapsible Sections		<input checked="" type="checkbox"/>		
Create Pinned Region Pages for Your Console Apps		<input checked="" type="checkbox"/>		
Display Paused Flow Interviews on Home Pages		<input checked="" type="checkbox"/>		
Gather Feedback from Users with the Surveys Component		<input checked="" type="checkbox"/>		
Use F6 to Switch Lightning App Builder Panel Focus		<input checked="" type="checkbox"/>		
Flow				
Flow Design				
Build Richer Flow Screens with Lightning Components		<input checked="" type="checkbox"/>		
Override the Default Header and Footer on Flow Screens		<input checked="" type="checkbox"/>		
Track Progress Through a Flow with Stages (Beta)		<input checked="" type="checkbox"/>		
Call JavaScript Directly from Your Flow with Local Actions (Pilot)			<input checked="" type="checkbox"/>	
Upload Files Directly from a Flow		<input checked="" type="checkbox"/>		
Some Flow Types Have New Labels		<input checked="" type="checkbox"/>		
Flow Distribution				
Launch Flows as Subtabs in Lightning Console Apps (Pilot)			<input checked="" type="checkbox"/>	
Launch a Flow from an Object-Specific Action (Generally Available)		<input checked="" type="checkbox"/>		
Start Flows Dynamically from Apex		<input checked="" type="checkbox"/>		
Check Which Flow Translations Are Out of Date		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Execute All Autolaunched Flow Interviews When Invoked in Bulk (Critical Update)			<input checked="" type="checkbox"/>	
Paused Flow Interviews				
Resume Paused Interviews That Other Users Own	<input checked="" type="checkbox"/>			
Resume Paused Flow Interviews from Lightning Experience		<input checked="" type="checkbox"/>		
Associate Paused Flow Interviews with a Record		<input checked="" type="checkbox"/>		
Track More Information About Paused Flow Interviews		<input checked="" type="checkbox"/>		
Fields and Picklists				
Track Time with the Time Field Type (Beta)		<input checked="" type="checkbox"/>		
Keep Your Record Type Value Settings When You Convert a Custom Picklist to a Custom Multi-Select Picklist		<input checked="" type="checkbox"/>		
New Formula Functions		<input checked="" type="checkbox"/>		
User Management				
Enable External Users to Self-Deactivate			<input checked="" type="checkbox"/>	
Access Enhanced Profile Features in User Management Settings Node		<input checked="" type="checkbox"/>		
Salesforce Connect				
Troubleshoot Access to External Objects with New and Updated Debug Event Types		<input checked="" type="checkbox"/>		
Track External Object Data Callouts with Event Log Files (Pilot)		<input checked="" type="checkbox"/>		
Retrieve and Deploy Compact Layouts for External Objects		<input checked="" type="checkbox"/>		
New Orgs Get an Improved OData 2.0 Adapter for Salesforce Connect		<input checked="" type="checkbox"/>		
General Setup				
Control Access to Roles and Role Hierarchy with a New Permission		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Assign Separate Standard Action Overrides for Different Experiences		<input checked="" type="checkbox"/>		
Access Schema Settings in Setup		<input checked="" type="checkbox"/>		
The Allow WebLink Access via the Tooling API System Permission Has a New Name		<input checked="" type="checkbox"/>		
Locale-Friendly Address Formats		<input checked="" type="checkbox"/>		
"Stop Automated Field Updates from Suppressing Email Notifications" Critical Update Postponed			<input checked="" type="checkbox"/>	
AppExchange				
Make Purchases on AppExchange with Your Bank Account	<input checked="" type="checkbox"/>			
See the Approval Status of an AppExchange Package	<input checked="" type="checkbox"/>			

Security and Identity

You can now get event log files hourly or daily, and delete them as needed. Add dynamic branding to your Embedded Login and authentication providers. And update your Security Health Check custom baselines with new settings right from the UI.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Authentication and Identity				
Target Your Websites with Embedded Login Dynamic Branding		<input checked="" type="checkbox"/>		
Support Multi-Language Embedded Logins with the Locale Parameter		<input checked="" type="checkbox"/>		
Add a Dynamic Login Experience to Auth. Provider URLs		<input checked="" type="checkbox"/>		
Control When Users Are Prompted for Reauthentication and Reapproval Using Auth. Provider URLs		<input checked="" type="checkbox"/>		
Take Full Control of Your Login Process with Visualforce Page Login Flows		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Verify Community External Users' Identity		<input checked="" type="checkbox"/>		
Set Identity Verification Settings and Access Policies in One Place (Beta)				<input checked="" type="checkbox"/>
Require Two-Factor Authentication Using Apex Triggers		<input checked="" type="checkbox"/>		
Improve Social Sign-On Performance with Optimized Auth. Provider URLs		<input checked="" type="checkbox"/>		
Set Third-Party Account Links Via the API				<input checked="" type="checkbox"/>
Set Different Login Policies for Salesforce and Community Users (Beta)		<input checked="" type="checkbox"/>		
Trigger Custom Application Logic When Users Log Out (Beta)				<input checked="" type="checkbox"/>
Boost Customer Engagement by Extending External Identity Community Sessions (Beta)				<input checked="" type="checkbox"/>
Create External Identity Users Without Contacts (Pilot)				<input checked="" type="checkbox"/>
Sandboxes Use Lowercase My Domain Hostnames		<input checked="" type="checkbox"/>		
Implement Advanced Authentication for Android Users of Custom Domains			<input checked="" type="checkbox"/>	
Connected App IP Relaxation Policy Label Is Easier to Understand		<input checked="" type="checkbox"/>		
Salesforce Shield				
Platform Encryption: Key Derivation Opt-Out, More Encrypted PII Fields, Deterministic Encryption (Beta), Automatic Mass Decryption				
Opt Out of Key Derivation with BYOK (Beta)				<input checked="" type="checkbox"/>
Encrypt More PII Fields on Opportunities and Contracts (Generally Available)			<input checked="" type="checkbox"/>	
Store Data Privacy Preferences with the Individual Name			<input checked="" type="checkbox"/>	
Encrypt Activities, Email Messages, Emails to Case, and Custom Object Name (Pilot)				<input checked="" type="checkbox"/>

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Filter Encrypted Data with Deterministic Encryption Using Exact, Case-Sensitive Matching (Beta)				<input checked="" type="checkbox"/>
Test-Drive Deterministic Encryption Using Exact, Case-Insensitive Matching (Pilot)				<input checked="" type="checkbox"/>
Include Encrypted Fields in Skinny Tables (Generally Available)				<input checked="" type="checkbox"/>
Include Encrypted Fields in Matching Rules Used in Duplicate Management (Beta)				<input checked="" type="checkbox"/>
Mass Decrypt Field Data Automatically			<input checked="" type="checkbox"/>	
Enable Self-Service Search Index Encryption from Setup				<input checked="" type="checkbox"/>
Get Right to Work with Streamlined Encryption Setup Pages			<input checked="" type="checkbox"/>	
Check Your Encryption Coverage with Encryption Statistics (Generally Available)				<input checked="" type="checkbox"/>
Event Monitoring				
Increase Data Protection by Deleting Event Log Files			<input checked="" type="checkbox"/>	
Review Events Hourly to Improve Activity Visibility (Beta)			<input checked="" type="checkbox"/>	
Track Insecure External Assets with Event Log Files			<input checked="" type="checkbox"/>	
Track User Actions in Time-Based Workflows More Comprehensively			<input checked="" type="checkbox"/>	
Track External Object Callouts Comprehensively (Pilot)			<input checked="" type="checkbox"/>	
Fields Retired in EventLogFile Event Types			<input checked="" type="checkbox"/>	
Health Check				
Health Check Has New Security Settings			<input checked="" type="checkbox"/>	
Update a Custom Baseline with New Settings			<input checked="" type="checkbox"/>	
Other Security Changes				
Alert Users Before They're Redirected Outside Salesforce			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Schedule a Security Assessment on Salesforce Environments Before Testing				<input checked="" type="checkbox"/>
Salesforce URLs No Longer Appear in Google Search Results		<input checked="" type="checkbox"/>		

Salesforce IoT

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. Explorer offers built-in integration with Salesforce data and lets you leverage your Customer Relationship Management (CRM) investments in Salesforce. This release includes a new IoT REST API to retrieve and manipulate orchestrations and their related components, and a new user interface for contexts. Also, we're introducing an IoT usage monitoring page, email alerts, and the ability to export and delete IoT data for data privacy.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Access and Manipulate IoT Components with the Salesforce IoT REST API			<input checked="" type="checkbox"/>	
See Associated Events and Salesforce Object in One Glance			<input checked="" type="checkbox"/>	
Get IoT Usage Data at Your Fingertips			<input checked="" type="checkbox"/>	
Get Warned About Usage with Email Alerts			<input checked="" type="checkbox"/>	
Export and Delete IoT Data for Data Privacy			<input checked="" type="checkbox"/>	

Development

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to Lightning Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Einstein Platform Services				
JWT Token Is Now Longer		<input checked="" type="checkbox"/>		
Change API Endpoint to Maintain Access to Einstein Platform Services		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Einstein Vision: Object Detection, Getting All Image Examples for a Label				
Locate Image Objects with Einstein Object Detection		<input checked="" type="checkbox"/>		
Get All Image Examples for a Label		<input checked="" type="checkbox"/>		
Einstein Language: Learning Curve Metrics, Precision-Recall Curve, Getting All Text Examples for a Label				
Build Natural Language Processing into Your Apps with Einstein Language		<input checked="" type="checkbox"/>		
Understand Your Language Model with Learning Curve Metrics		<input checked="" type="checkbox"/>		
Understand Your Language Model Using the Precision-Recall Curve		<input checked="" type="checkbox"/>		
Get All Text Examples for a Label		<input checked="" type="checkbox"/>		
Lightning Components				
Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Critical Update)			<input checked="" type="checkbox"/>	
API Access for <lightning:container> Apps Is Revoked (Critical Update)			<input checked="" type="checkbox"/>	
Component Library (Beta): View Unauthenticated Site, Custom Components, and Interface Documentation				
View the Component Library as an Unauthenticated Experience		<input checked="" type="checkbox"/>		
View Lightning Component Resources in Custom Namespaces and Packages		<input checked="" type="checkbox"/>		
View Interface Documentation Beyond Attributes and Methods		<input checked="" type="checkbox"/>		
Validation for Component Attribute Types				
Find Dynamically Created Components		<input checked="" type="checkbox"/>		
Action Overrides That Use Lightning Components Are Supported in Lightning Console Apps		<input checked="" type="checkbox"/>		
<style> Tag Not Allowed in Components		<input checked="" type="checkbox"/>		
Changes in Locker Service		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Lightning Components		<input checked="" type="checkbox"/>		
New and Changed Lightning Events		<input checked="" type="checkbox"/>		
New and Changed Lightning Interfaces		<input checked="" type="checkbox"/>		
Visualforce				
Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files (Critical Update)			<input checked="" type="checkbox"/>	
Enable the Lightning Console UI Theme (Critical Update)		<input checked="" type="checkbox"/>		
Simplify Your Visualforce Lightning Experience Rollout		<input checked="" type="checkbox"/>		
<apex:slds> Supports Lightning Experience and Custom Styling		<input checked="" type="checkbox"/>		
Detect the Lightning Console UI Theme in Visualforce Pages		<input checked="" type="checkbox"/>		
Custom Metadata Types				
Employ Validation Rule Formulas with Custom Metadata Types (Pilot)		<input checked="" type="checkbox"/>		
Easily Insert Fields in Custom Metadata Types (Pilot)		<input checked="" type="checkbox"/>		
Apex				
Platform Cache: Now Available in Lightning		<input checked="" type="checkbox"/>		
Apex: New and Changed Classes				
Changed Apex Classes		<input checked="" type="checkbox"/>		
ConnectApi (Chatter in Apex): New and Changed Classes and Enums				
New and Changed Chatter in Apex Classes		<input checked="" type="checkbox"/>		
New and Changed Chatter in Apex Input Classes		<input checked="" type="checkbox"/>		
New and Changed Chatter in Apex Output Classes		<input checked="" type="checkbox"/>		
New and Changed Chatter in Apex Enums		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
API				
New and Changed Objects				
New Objects		<input checked="" type="checkbox"/>		
Changed Objects		<input checked="" type="checkbox"/>		
SOQL				
REST API				
New Resource: Fewer Round-Trips with SObject Collections		<input checked="" type="checkbox"/>		
SOAP API				
New, Changed, and Deprecated Calls		<input checked="" type="checkbox"/>		
Chatter REST API				
New and Changed Chatter REST API Resources		<input checked="" type="checkbox"/>		
New and Changed Chatter REST API Request Bodies		<input checked="" type="checkbox"/>		
New and Changed Chatter REST API Response Bodies		<input checked="" type="checkbox"/>		
Reports and Dashboards REST API				
New Resources and Parameters: notifications?source=lightningDashboardSubscribe, related-objects, and text-values		<input checked="" type="checkbox"/>		
New Methods: folders		<input checked="" type="checkbox"/>		
Changed Resources: dashboardMetadata and reportTypeMetadata		<input checked="" type="checkbox"/>		
User Interface API				
Build UI for Dependent Picklists		<input checked="" type="checkbox"/>		
Build UI for List Views		<input checked="" type="checkbox"/>		
Get a Directory of Supported Objects		<input checked="" type="checkbox"/>		
Improve App Performance with ETag Headers		<input checked="" type="checkbox"/>		
Get a Salesforce Org's Active Theme		<input checked="" type="checkbox"/>		
Tooling API				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Tooling API New and Changed Objects		<input checked="" type="checkbox"/>		
Metadata API		<input checked="" type="checkbox"/>		
Data Services: Compliance Enhancements and Delete Permissions				
Let Users Delete Data in Custom Big Objects				<input checked="" type="checkbox"/>
Delete Field History and Field Audit Trail Data				<input checked="" type="checkbox"/>
Salesforce Console APIs		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Debugging				
Collect Debug Logs for Guest Users Without Setting Cookies		<input checked="" type="checkbox"/>		
Avoid Huge Debug Logs for Managed Package Code		<input checked="" type="checkbox"/>		
Use Free ISV Customer Debugger Sessions Along with Purchased Apex Debugger Sessions		<input checked="" type="checkbox"/>		
Troubleshoot External Object Callouts with New and Updated Debug Event Types		<input checked="" type="checkbox"/>		
Developer Hub		<input checked="" type="checkbox"/>		
Source Tracking (Beta)		<input checked="" type="checkbox"/>		
Second-Generation Packaging				
Create and Install Unlocked Packages (Beta)		<input checked="" type="checkbox"/>		
Protect Metadata with Locked Packages (Pilot)				
Include More Components in Developer-Controlled Packages		<input checked="" type="checkbox"/>		
Install Packages from a URL		<input checked="" type="checkbox"/>		
New Packaging Options with the Salesforce CLI		<input checked="" type="checkbox"/>		
Control Second-Generation Packaging with User Permissions		<input checked="" type="checkbox"/>		
Packaging API Changes		<input checked="" type="checkbox"/>		
Salesforce Extensions for VS Code			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Force.com IDE 2 Beta Discontinued			<input checked="" type="checkbox"/>	
Sandbox	<input checked="" type="checkbox"/>			
Salesforce CLI		<input checked="" type="checkbox"/>		
ISVforce				
Get the Same Behavior for Global Value Sets and Standard Value Sets in Managed Package Upgrades			<input checked="" type="checkbox"/>	
Refresh Components List in Package Details as Needed		<input checked="" type="checkbox"/>		
Change Package Primary Contact		<input checked="" type="checkbox"/>		
Remove Deprecated Package Archives		<input checked="" type="checkbox"/>		
Create Partner Edition Scratch Orgs (available within 24 hours after the release)		<input checked="" type="checkbox"/>		
Package Approval Status Displays Before Installation		<input checked="" type="checkbox"/>		
Grow Your Business Faster with the AppExchange Trailblazer Scorecard			<input checked="" type="checkbox"/>	
Accept Bank Payments in AppExchange Checkout			<input checked="" type="checkbox"/>	
Enterprise Messaging				
Keep Your External Data up to Date with Change Data Capture (Pilot)				<input checked="" type="checkbox"/>
Deliver Millions of Events Per Day with High-Volume Platform Events (Pilot)				<input checked="" type="checkbox"/>
Handle Invalid Connections in Streaming API		<input checked="" type="checkbox"/>		

Supported Browsers

We've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

IN THIS SECTION:

[Supported Browsers for Lightning Experience](#)

See the supported browsers and limitations for Lightning Experience.

[Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11](#)

We previously communicated that the end of support date for Internet Explorer version 11 (IE11) for Lightning Experience was December 16, 2017. We received your feedback, and as a result are offering Extended Support for IE11. This extended support is available through December 31, 2020.

[Supported Browsers for Salesforce Classic](#)

Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11, and Apple® Safari® version 11.x on macOS. The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported. There are some limitations.

Supported Browsers for Lightning Experience

See the supported browsers and limitations for Lightning Experience.

EDITIONS



Note:

- Salesforce doesn't support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic, Lightning Experience, or Salesforce mobile web. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce, see [Requirements for the Salesforce App](#).

Lightning Experience is available in: **Essentials**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

! **Important:** Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience and Communities until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- It is strongly recommended that you do not use Internet Explorer 11 with Community Builder.
- This change doesn't impact Salesforce Classic.

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Console Apps	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Communities	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Special setup considerations?	No	No	No	No	No
Limitations?	Yes	Yes	No	Yes	Yes

 **Note:** The term "latest version" is defined by the browser vendors. Use the support for your browser(s) to understand what "latest version" means.

Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11

We previously communicated that the end of support date for Internet Explorer version 11 (IE11) for Lightning Experience was December 16, 2017. We received your feedback, and as a result are offering Extended Support for IE11. This extended support is available through December 31, 2020.

We believe that this extended period will give you the time you need to migrate from IE11 to more modern and secure browsers, while still allowing you to take advantage of the benefits of Lightning Experience now.

For complete details of Extended Support for IE11, including what's covered and what isn't, and steps you need to take, see [Retirement of Support for Accessing Lightning Experience Using Microsoft Internet Explorer version 11](#).

Editions

Lightning Experience is available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11, and Apple® Safari® version 11.x on macOS. The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported. There are some limitations.

 **Note:** Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce, check out [Requirements for the Salesforce App](#).

Editions

Salesforce Classic available in: **All Editions**

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 9+	Latest	Latest	Latest	11.x+
Salesforce Console	IE 9+	Latest	Latest	Latest	No
Special setup considerations?	Yes	No	No	Yes	No
Limitations?	Yes	Yes	No	No	Yes

**Note:**

- The term "latest version" is defined by the browser vendors. Use the support for your browser(s) to understand what "latest version" means.
- Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

Salesforce Overall: Improved Productivity with Lightning Experience Personalized Navigation, Themes, and Surveys

Personalize your app's navigation bar to suit the unique way you work. Explore the new themes, macros, and quick text. Create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. Lightning Console Apps has something new for every admin, agent, and developer. Filters arrive to Account and File search results. And regardless of the regulations and policies with which you're complying for data protection and privacy, we give you guidance in evaluating the best way to meet your requirements.

IN THIS SECTION:

[Get Guidance for Data Protection and Privacy Regulations](#)

Work your way toward complying with data protection and privacy regulations. Regardless of the regulations and policies with which you're complying, we give you guidance to help you evaluate the best way to meet your requirements.

[Store Certain Data Privacy Preferences](#)

Data privacy records, based on the Individual object, let you store certain data privacy preferences for your customers. These records can help you honor and respect your customers' wishes when they request only specific forms of contact from your company. Some laws and regulations, such as the General Data Protection Regulation (GDPR), can require you to honor your customers' wishes.

[Supercharge Your Productivity with Personalized Navigation in Lightning Experience](#)

Personalize an app's navigation bar to suit the unique way you work. You can reorder items, and rename or remove items that you've added. We've also given you more ways to navigate with temporary tabs. This feature is new in Lightning Experience.

[Show Your True Colors with Themes in Lightning Experience](#)

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of Salesforce's built-in themes or create your own custom themes with just a few clicks. This feature is new in Lightning Experience.

[Gather Feedback with Salesforce Surveys \(Generally Available\)](#)

Introducing Salesforce Surveys! Create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. Add different types of questions to gather the data you need. All your valuable survey data is stored in your org, so you can harness the power of Salesforce to view data, create reports and dashboards, and share insights with your company. This feature is generally available in Classic and Lightning Experience.

[Enable the New URL Format for Lightning Experience and the Salesforce Mobile App \(Critical Update\)](#)

We're changing the URL format used by Lightning Experience standard apps and the Salesforce mobile app. The new URL format is more readable and addresses the issue of being directed to an unexpected location when accessing Lightning Experience URLs before authenticating. This update doesn't apply to Lightning Experience console apps and communities.

[Boost Productivity with Quick Text and Macros](#)

Macros are available in Lightning apps on most standard and custom objects. Quick text joins your Lightning Experience toolbox, too. These changes apply to Lightning Experience only.

[Get Record Detail Information at a Glance](#)

We improved the layout of the Record Detail component, increasing its readability while also increasing the density of the information it displays. This change applies to Lightning Experience only.

[Lightning Console Apps: Web Tabs, Pinned Region Lightning Pages, and More](#)

We've got something for everyone in this release. Your console users can save time and effort with powerful tools like quick text and macros. As an admin, we've given you new design flexibility with using pinned region pages and the new accordion component. And let's not forget the developers! We're giving them tools that allow deep integrations and improvements in automation. These changes apply to Lightning Experience only.

[Search: More Ways to Refine Your Search Results](#)

Filters are here in Lightning Experience, starting with accounts and files. We also improved the Top Results page, which shows the results for the objects most relevant to you at the top. And, as always, more objects are searchable.

[Get Up to Date on Your Lightning Experience Readiness](#)

Run your Readiness Check lately? Even if you've run it before, run it again. We're releasing updates throughout Spring '18 to give you the latest recommendations, more user impact details, and a redesigned summary page that includes improved readiness statuses. Plus, Premier and Signature Success Plan customers see content customized exclusively for their program. These changes apply to both Lightning Experience and Salesforce Classic.

[Change in User Impact Counts for the Readiness Check](#)

Starting in February 2018, your Readiness Report includes only some types of user licenses in user impact counts. These changes apply to both Lightning Experience and Salesforce Classic.

[Deactivate Orgs You Don't Use](#)

When an org has outlived its usefulness and it's time to move on, you can deactivate it. When you deactivate an org, you have 30 days to change your mind and reactivate it. After 30 days, the org is locked, and you must contact Salesforce Customer Support to reactivate it. After 60 days, the org is permanently deleted from Salesforce servers.

[View Help Topics Wherever You Are in Lightning Experience](#)

Looking for help in Salesforce? Get it without leaving the page you're on. In the Lightning Experience Help menu, click a help topic to preview it directly in the Help menu. Pin it to keep it open while you work. This change applies to Lightning Experience only.

[Popup Helps You and Your Users Adopt Lightning Experience](#)

If you've enabled Lightning Experience, we're here to help you and your users make the move. Starting on January 15, your eligible users still using Salesforce Classic are prompted to give Lightning Experience a shot.

[Manage User Onboarding in a Single Place](#)

When you enable Lightning Experience, we're here to help you and your users work faster and smarter. Starting on April 10, 2018, users that you've granted access to Lightning Experience are now offered contextual help on how to use common features, such as tasks and calendar. The learning prompts appear only when the specific feature is being used in Salesforce Classic. We'll be rolling out these training tips throughout 2018 to make learning and onboarding easier. This change applies to Lightning Experience only.

[Choose to Send Contact Information with Your Feedback](#)

When you give feedback to Salesforce via the Help menu, you can choose to send your contact information. This change applies to Lightning Experience only.

[Switch to Lightning Experience with One Fewer Click](#)

Use the convenient link in the header to quickly move between user interfaces. Only users enabled for Lightning Experience see the link. This change applies to Lightning Experience only.

[The Global Actions Menu Has New Header Text](#)

The Global Actions menu contains all kinds of global actions, not just Create a Record type actions. To clarify that, we changed the menu's header text from "Create" to "Global Actions." This change applies to Lightning Experience only.

Evaluate Your Implementation with Salesforce Optimizer

We're making updates to the Salesforce Optimizer report throughout the release. These changes apply to both Lightning Experience and Salesforce Classic.

Force.com Is Now Lightning Platform

In 2007, we launched Force.com, our core platform technology. We're changing the name to Lightning Platform because, in the past 10 years, it's become so much more. It will take some time to see every reference to Force.com removed from our product, but from here on out, it's Lightning Platform.

Get Guidance for Data Protection and Privacy Regulations

Work your way toward complying with data protection and privacy regulations. Regardless of the regulations and policies with which you're complying, we give you guidance to help you evaluate the best way to meet your requirements.

EDITIONS

Available in: **All** Editions

Data protection and privacy regulations can require you and your company to keep individuals' personal data secure and private. We've listed some of the regulations that are important to many companies collecting and processing their customers' data.

- General Data Protection Regulation (GDPR), European Union
- Personal Information Protection Act (PIPA), Japan
- Health Insurance Portability and Accountability Act (HIPAA), United States
- Privacy Act, Australia
- Personal Information Protection and Electronic Documents Act (PIPEDA), Canada

Regulations can include principles that are similar to one another. So we give you guidance on some of the common privacy principles in [Data Protection and Privacy](#).

Store Certain Data Privacy Preferences

Data privacy records, based on the Individual object, let you store certain data privacy preferences for your customers. These records can help you honor and respect your customers' wishes when they request only specific forms of contact from your company. Some laws and regulations, such as the General Data Protection Regulation (GDPR), can require you to honor your customers' wishes.

EDITIONS

Available in: **All** Editions

The standard object, *Individual*, includes fields for storing data privacy preferences in data privacy records. These records are associated with your company's leads, contacts, or person accounts in Salesforce. Although data privacy records let you track and store certain data privacy preferences, it's up to you to determine how to honor those preferences. And if your company has special policies with which you comply, you can add your own custom fields to the Individual object.

In data privacy records, track and store customers' preferences for:

- Collecting, storing, and sharing their personal data
- Packaging their personal data so they can take ownership of it
- Deleting records and personal data related to them
- Solicitation of products and services
- Tracking their geolocation and web activity

Here's how you let your users track and store certain data privacy preferences.

1. From Setup, enter *Data Protection and Privacy* in the Quick Find box, and then select **Data Protection and Privacy**.

2. Click **Edit** and select **Make data protection details available in records** and click **Save**.
3. Add the **Individual** field to Lead, Contact, or Person Account page layouts.

SEE ALSO:

[Salesforce Help: Set Up Data Protection and Privacy](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Best Practices for Data Privacy Preferences](#) (can be outdated or unavailable during release preview)

[Store Data Privacy Preferences with the Individual Name](#)

Supercharge Your Productivity with Personalized Navigation in Lightning Experience

Personalize an app's navigation bar to suit the unique way you work. You can reorder items, and rename or remove items that you've added. We've also given you more ways to navigate with temporary tabs. This feature is new in Lightning Experience.

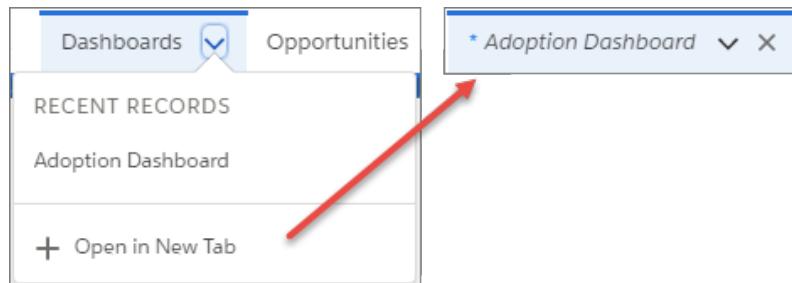
Personalized navigation in Lightning Experience is similar to customized tab sets in Salesforce Classic but better. In Lightning Experience, the navigation bar can contain more than just object-level items, like Accounts. You can add granular items, like a dashboard, list, or record.

EDITIONS

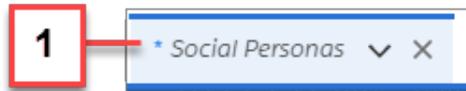
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Manage Your Views with Temporary Tabs

Use temporary tabs to access important items directly from the navigation bar. For example, open a frequently used dashboard in a temporary tab to access it instantly from anywhere.



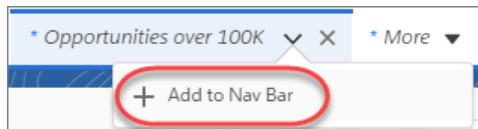
Temporary tabs are also a great way to manage items that aren't in your current app. For example, let's say you open an item from the App Launcher, from your favorites list, or from a link. If it's not already accessible from the navigation bar, the item opens as a temporary tab where it's in easy reach.



The asterisk next to the item (1) means it's a temporary tab. Temporary tabs are removed from the navigation bar when you close them, log out of Salesforce, or switch to a different app. But you can permanently add them to the navigation bar. Let's look at that next.

Make a Temporary Tab a Permanent Part of the Navigation Bar

Do you always start your day with a specific item, like a list or dashboard? It's easy to add it to the app's navigation bar. Open the item as a temporary tab, and select **Add to Nav Bar** from the dropdown menu.



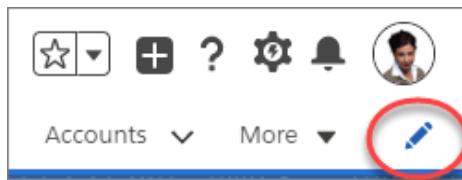
Now it's a permanent item in the app's navigation bar.

Manage Items in the Navigation Bar

Add your own items to the navigation bar and tweak them to suit how you work.

- Change the order of items to match your workflow
- Rename or remove items that you've added

Click the pencil icon in the navigation bar to make changes.



Keep these considerations in mind when personalizing your navigation.

- You can reorder, rename, or remove items that you've added to a navigation bar, but you can't remove or rename the default items defined by admins.
- A navigation bar can have up to 50 items, which includes the default items. If a navigation bar already has 50 default items, you can't add more.
- If you open temporary tabs and then open a new web browser tab, the temporary tabs aren't available in the new browser tab.
- Admins can't access or modify the personal items users add to a navigation bar.
- Personalizations that you make in Lightning Experience aren't available in Salesforce Classic.

Important Actions for Admins

Help your users get the most out of personalized navigation.

- Note:** If you don't want your users to personalize the navigation bar for any app they use, you can disable personalization. From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Select **Disable Navigation Bar Personalization in Lightning Experience**. And stay tuned. In an upcoming release, we'll give you control of navigation bar personalization for specific apps.

- Upgrade your Classic apps to Lightning apps. Your users can't personalize the navigation bar of Classic apps in Lightning Experience.
- Check what's in your apps. Now that your users can add their own navigation items, it's a good idea to remove clutter from the navigation bar. Your users can't remove the items you include in the navigation bar, and they can't personalize it if it contains more

than 50 items. For example, if you include 32 items in an app's navigation bar, your users can add an additional 18 personal items. After that, they can't add more personal items.

- Avoid opening temporary tabs by adding appropriate parent objects to the app's navigation bar. For example, to prevent a contract list or record from opening as a temporary tab, add Contracts to the navigation bar.

SEE ALSO:

[IdeaExchange: Customize My Tabs in Lightning Experience](#)

Show Your True Colors with Themes in Lightning Experience

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of Salesforce's built-in themes or create your own custom themes with just a few clicks. This feature is new in Lightning Experience.

From Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**. You can view, preview, and activate an existing theme or click **New Theme** to create your own.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, and Unlimited** Editions

NAME	DEVELOPER NA...	DESCRIPTION	LAST MODIFIED	THEME TY...	ACTIVE
Lightning Blue	Lightning	The sky's the limit with Salesfo...	10/31/2017	Salesforce	✓
Lightning Lite	LightningLite	A streamlined, white-backgrou...	10/31/2017	Salesforce	
Lightning Ridge	LightningRidge	Majestic blue ridges dominate...	10/31/2017	Salesforce	
Codey Canyon	CodeyCanyon	Sinuous red rocks recall the W...	10/31/2017	Salesforce	
Cloudy Sky	CloudySky	Misty sea-green and gray ming...	10/31/2017	Salesforce	
Seasonal Flair	Seasonal	Go with the flow! Our seasona...	10/31/2017	Salesforce	
Einstein Relativity	EinsteinRelativity	An atmospheric blue-green th...	10/31/2017	Salesforce	

Upload a brand image, and choose brand colors. Optionally, upload a page background image, default banners, and avatars for groups and user profiles.

The screenshot shows the 'New Custom Theme' setup page in Salesforce. At the top, there's a header with a gear icon and the text 'SETUP > THEMES AND BRANDING'. Below the header, it says 'New Custom Theme'. A note states: 'A theme is a set of colors and Images that represents your org's brand. You can create your own theme or choose from a set of built-in themes provided by Salesforce.' The page is divided into several sections:

- Theme Details:** Fields for 'Theme Name' (required), 'API Name' (required), and 'Description'.
- Branding:** Includes 'Brand Image (600x120 pixels)' with a preview thumbnail showing a blue cloud icon, and 'Brand Color' with a color picker set to #0070D2.
- Colors:** Sections for 'Page Background' (#FFFFFF) and 'Global Header Background' (#FFFFFF), along with a 'Brand-Based Color Palette' showing four color swatches: dark blue, white, black, and dark gray.
- Images:** A section for 'Page Background Image (1800x360 pixels)' with an 'Upload' button.

Only one theme can be active at a time, and a theme applies to your entire org. You can also choose whether to use an app's brand image and navigation bar color instead of a custom theme's brand image and navigation bar color when using the app. To enable this override, navigate to the App Manager in Setup. Click for a Lightning app, select **Edit**, then click **App Details & Branding**.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

Sales
Manage your sales process with accounts, leads, opport...

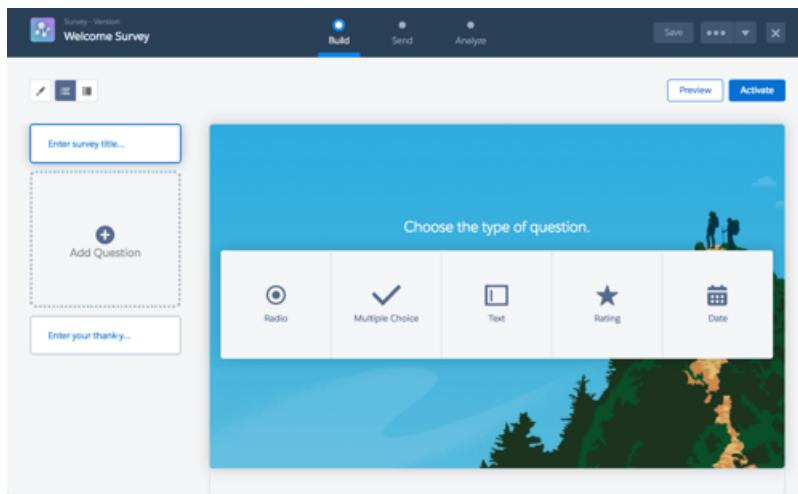
Keep these considerations in mind when working with themes.

- By default, orgs use the built-in Lightning Blue theme.
- You can create up to 300 custom themes, but you can't modify or clone the built-in themes provided by Salesforce.
- Chatter External users only see the built-in Lightning Blue theme.

Theme and brand-based colors show up in various places in the user interface, including page backgrounds, the global header, navigation bar, tabs, and buttons. There's more ways we want to make themes and branding a part of your Salesforce experience, so let us know what you think.

Gather Feedback with Salesforce Surveys (Generally Available)

Introducing Salesforce Surveys! Create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. Add different types of questions to gather the data you need. All your valuable survey data is stored in your org, so you can harness the power of Salesforce to view data, create reports and dashboards, and share insights with your company. This feature is generally available in Classic and Lightning Experience.



EDITIONS

Available by default in: **Developer, Enterprise, Performance, and Unlimited** Editions with Health Cloud

Available for an additional fee in: **Developer, Enterprise, Performance, and Unlimited** Editions without Health Cloud

Want to reach a wider audience? You can embed surveys into Lightning pages and communities. Anyone who has permission to access pages and communities can provide feedback where they're already working. For Lightning pages, use the Lightning App Builder to add the Survey standard Lightning component to your pages. For communities, use the Community Builder to add the Survey component.

SEE ALSO:

- [Gather Feedback from Your Community with the Survey Component](#)
- [Gather Feedback from Users with the Surveys Component](#)
- [Flow: Lightning Components in Screens, Stages, Autolaunch in Lightning Console Apps](#)

Enable the New URL Format for Lightning Experience and the Salesforce Mobile App (Critical Update)

We're changing the URL format used by Lightning Experience standard apps and the Salesforce mobile app. The new URL format is more readable and addresses the issue of being directed to an unexpected location when accessing Lightning Experience URLs before authenticating. This update doesn't apply to Lightning Experience console apps and communities.

For example:

- Current format: `https://<lightning.domain.com>/one/one.app/#/sObject/Account/home`
- New format: `https://<lightning.domain.com>/lightning/o/Account/home`

Custom or installed Lightning components that parse a URL may break or behave differently after this change, especially components with logic that relies on `window.location` or the `aura:locationChange` event.

EDITIONS

Available in: **All** Editions

If you have query string parameters appended to /one/one.app such as /one/one.app?myparam1=xyz&myparam2=abc, they'll be rewritten as /lightning?0.myparam1=xyz&0.myparam2=abc.

Critical Update Timeline

- This critical update is disabled by default in existing orgs in Spring '18.
- This critical update is enabled by default in new orgs beginning in Spring '18, for Lightning Experience standard apps and the Salesforce mobile app. It doesn't apply to Lightning Experience console apps and communities.
- This critical update will be automatically enabled for all orgs on the auto-activation date, currently scheduled for the Summer '18 production release. The Summer '18 update will apply to Lightning Experience standard apps, Lightning Experience console apps, and the Salesforce mobile app. Communities won't be affected. The specific date for your org is available in the Critical Update Console in Setup.

We recommend that you enable this critical update in a sandbox first to test it, and make necessary adjustments before the new URLs go live for everyone.

Boost Productivity with Quick Text and Macros

Macros are available in Lightning apps on most standard and custom objects. Quick text joins your Lightning Experience toolbox, too. These changes apply to Lightning Experience only.

SEE ALSO:

- [Let Macros Do Your Work Everywhere](#)
- [Increase Your Efficiency with Quick Text](#)

EDITIONS

Quick text is available in:
Professional, Enterprise, Performance, Unlimited, and Developer Editions

Macros is available in:
Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Get Record Detail Information at a Glance

We improved the layout of the Record Detail component, increasing its readability while also increasing the density of the information it displays. This change applies to Lightning Experience only.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, and Unlimited** Editions

New Record Detail Component

The screenshot shows the new Record Detail Component for an Account record named "Anaco Limited". The top bar displays the account name and a "RELATED" button. Below the top bar, there are three tabs: "RELATED", "DETAILS" (which is selected), and "NEWS". The main content area contains two columns of data pairs, each with a small edit icon to the right. The left column includes fields like Account Owner, Account Name, Parent Account, Website, Type, Industry, and Description. The right column includes fields like Phone, Fax, Rating, Employees, Annual Revenue, and another Phone field.

Left Column	Right Column
Account Owner Bill West	Phone (655) 555-0153
Account Name Anaco Limited	Fax (655) 555-0182
Parent Account	Rating Warm
Website http://anacolimited.net	Employees 1,700
Type Customer	Annual Revenue \$51,000,000
Industry Consulting	
Description Up and coming player in the space.	

Previous Record Detail Component

The screenshot shows the previous Record Detail Component for an Account record named "Anaco Limited". The top bar displays the account name and a "RELATED" button. Below the top bar, there are three tabs: "RELATED", "DETAILS" (which is selected), and "NEWS". The main content area contains two columns of data pairs, each with a small edit icon to the right. The left column includes fields like Account Owner, Account Name, Parent Account, Website, Type, Industry, and Description. The right column includes fields like Phone, Fax, Rating, Employees, and Annual Revenue.

Left Column	Right Column
Account Owner Bill West	Phone (655) 555-0153
Account Name Anaco Limited	Fax (655) 555-0182
Parent Account	Rating Warm
Website www.anacolimited.net	Employees 1,700
Type Enterprise	Annual Revenue \$510,000,000
Industry Retail	
Description Up and coming player in the space.	

Lightning Console Apps: Web Tabs, Pinned Region Lightning Pages, and More

We've got something for everyone in this release. Your console users can save time and effort with powerful tools like quick text and macros. As an admin, we've given you new design flexibility with using pinned region pages and the new accordion component. And let's not forget the developers! We're giving them tools that allow deep integrations and improvements in automation. These changes apply to Lightning Experience only.



Walk Through It: Explore Lightning Console Apps



Note: Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more.](#)
You can't migrate Salesforce Classic console apps to Lightning Experience.

IN THIS SECTION:

[Use Web Tabs to Display Third-Party Content in the Lightning Console](#)

Let Lightning console users access web applications or other websites from within the application. Use the `openTab` or `openSubtab` JavaScript API methods to open web tabs inside Lightning console apps. Third-party domains such as

`https://www.yourappdomain.com` must be whitelisted in the CSP Trusted Sites. This feature is new in Lightning Experience.

[Use Classic Console Integration Toolkit Methods in Lightning Experience](#)

Starting with API version 42.0 of the Salesforce Console Integration Toolkit, many Salesforce Classic methods used in existing Visualforce pages and third-party web tabs work in Lightning Experience. Just point to the latest version of the toolkit script in your Visualforce pages or third-party web tabs. Third-party content must be whitelisted in the CSP Trusted Sites. This change applies to Lightning Experience only.

[Override Lightning Component Actions in Lightning Console Apps](#)

Get ready for deeper control over what users see when viewing or editing a record or opening a list. Action overrides that use Lightning components for View, New, Edit, and Tab are now supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide. This feature is new in Lightning Experience.

[Copy and Share Subtab and Workspace URLs Using Keyboard Shortcuts](#)

Agents, sales reps, and other console users can share links to active subtabs or the entire workspace. It's now easy for agents to transfer cases to other agents. Sales reps can hand over related subtabs for an account by quickly copying and sharing the workspace link. And we added keyboard shortcuts so that your users can copy links without using a mouse. This feature is new in Lightning Experience.

[Use Visualforce URLs in Lightning openTab and openSubtab Methods](#)

You can now open a Visualforce page in a Lightning console workspace or subtab. Use the Lightning Console JavaScript API methods `openTab` and `openSubtab`, and specify the `/apex/myVFPage` URL.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

[Enable the Lightning Console UI Theme \(Critical Update\)](#)

This critical update enables Lightning Console's exclusive UI Theme `Theme4u`, and will be activated automatically on October 5, 2018. Currently, `$User.UITheme` or `$User.UIThemeDisplayed` returns `Theme4d` for Visualforce pages in standard Lightning Experience apps and Lightning Console apps. Once the critical update is activated, Lightning Console apps return `Theme4u`, allowing Visualforce pages to differentiate between standard Lightning Experience apps and Lightning Console apps.

[Detect the Lightning Console UI Theme in Visualforce Pages](#)

Your Visualforce pages can detect whether they're loaded in Lightning apps with console navigation versus Lightning apps with standard navigation. This feature is new in Lightning Experience.

[Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again](#)

A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Customize your Lightning console app with pinned region pages so that console users can view and work with record information on different subtabs. Choose from three templates to pin a page's header, left sidebar, or both. Previously, this feature was available only in Salesforce Classic consoles. This feature is new in Lightning Experience.

[Supercharge Console Productivity with Quick Text and Macros](#)

Console apps already make your users productive, but we added tools to make them Productivity Rock Stars. Say hello to quick text and more powerful macros. These features are new in Lightning Experience.

[Reduce the Noise on Your Console Pages with Collapsible Sections](#)

Organize and present information in sections that collapse and expand by customizing your Lightning console app pages with the Accordion component. Only one section is expanded at a time, so your console users can focus on the information they're working with. This feature is new in Lightning Experience.

SEE ALSO:

[Salesforce Console APIs](#)

[Salesforce Console Developer Guide](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning Experience Console Limitations](#) (can be outdated or unavailable during release preview)

Use Web Tabs to Display Third-Party Content in the Lightning Console

Let Lightning console users access web applications or other websites from within the application. Use the `openTab` or `openSubtab` JavaScript API methods to open web tabs inside Lightning console apps. Third-party domains such as `https://www.yourappdomain.com` must be whitelisted in the CSP Trusted Sites. This feature is new in Lightning Experience.

SEE ALSO:

[Salesforce Help: Create CSP Trusted Sites to Access Third-Party APIs](#)

[Salesforce Console Developer Guide: openSubtab](#)

[Salesforce Console Developer Guide: openTab](#)

Use Classic Console Integration Toolkit Methods in Lightning Experience

Starting with API version 42.0 of the Salesforce Console Integration Toolkit, many Salesforce Classic methods used in existing Visualforce pages and third-party web tabs work in Lightning Experience. Just point to the latest version of the toolkit script in your Visualforce pages or third-party web tabs. Third-party content must be whitelisted in the CSP Trusted Sites. This change applies to Lightning Experience only.

SEE ALSO:

[Salesforce Help: Create CSP Trusted Sites to Access Third-Party APIs](#)

[Salesforce Console Developer Guide: Salesforce Console Integration Toolkit Methods Supported in Lightning Console JavaScript API](#)

Override Lightning Component Actions in Lightning Console Apps

Get ready for deeper control over what users see when viewing or editing a record or opening a list. Action overrides that use Lightning components for View, New, Edit, and Tab are now supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide. This feature is new in Lightning Experience.

Copy and Share Subtab and Workspace URLs Using Keyboard Shortcuts

Agents, sales reps, and other console users can share links to active subtabs or the entire work space. It's now easy for agents to transfer cases to other agents. Sales reps can hand over related subtabs for an account by quickly copying and sharing the workspace link. And we added keyboard shortcuts so that your users can copy links without using a mouse. This feature is new in Lightning Experience.

Here are the new keyboard shortcuts.

- Copy the URL for the active tab
 - Windows: Ctrl+c, then s
 - macOS: Cmd+c, then s
- Copy the URL for the active workspace tab and subtabs
 - Windows: Ctrl+c, then w
 - macOS: Cmd+c, then w

SEE ALSO:

[Salesforce Help: Keyboard Shortcuts for Lightning Console App](#)

Use Visualforce URLs in Lightning `openTab` and `openSubtab` Methods

You can now open a Visualforce page in a Lightning console workspace or subtab. Use the Lightning Console JavaScript API methods `openTab` and `openSubtab`, and specify the `/apex/myVFPage` URL.

Enable the Lightning Console UI Theme (Critical Update)

This critical update enables Lightning Console's exclusive UI Theme `Theme4u`, and will be activated automatically on October 5, 2018. Currently, `$User.UITheme` or `$User.UIThemeDisplayed` returns `Theme4d` for Visualforce pages in standard Lightning Experience apps and Lightning Console apps. Once the critical update is activated, Lightning Console apps return `Theme4u`, allowing Visualforce pages to differentiate between standard Lightning Experience apps and Lightning Console apps.

Test This Critical Update

Before activating the critical update, code used to determine whether the Visualforce page is used in Lightning Experience needs alterations. For example, the following code must be changed:

```
function inLightningExperience () {  
    return 'Theme4d' === '{!$User.UIThemeDisplayed}';  
}
```

Instead, use the following code to determine whether the page is in Lightning Experience:

```
function inLightningExperience () {  
    return ['Theme4d', 'Theme4u'].indexOf('{!$User.UIThemeDisplayed}') > -1;  
}
```

SEE ALSO:

[Detect the Lightning Console UI Theme in Visualforce Pages](#)

Detect the Lightning Console UI Theme in Visualforce Pages

Your Visualforce pages can detect whether they're loaded in Lightning apps with console navigation versus Lightning apps with standard navigation. This feature is new in Lightning Experience.

Check for the `Theme4u` value in UI context detection logic in the console, for example, using the `$User.UITheme` and `$User.UIThemeDisplayed` global variables.

SEE ALSO:

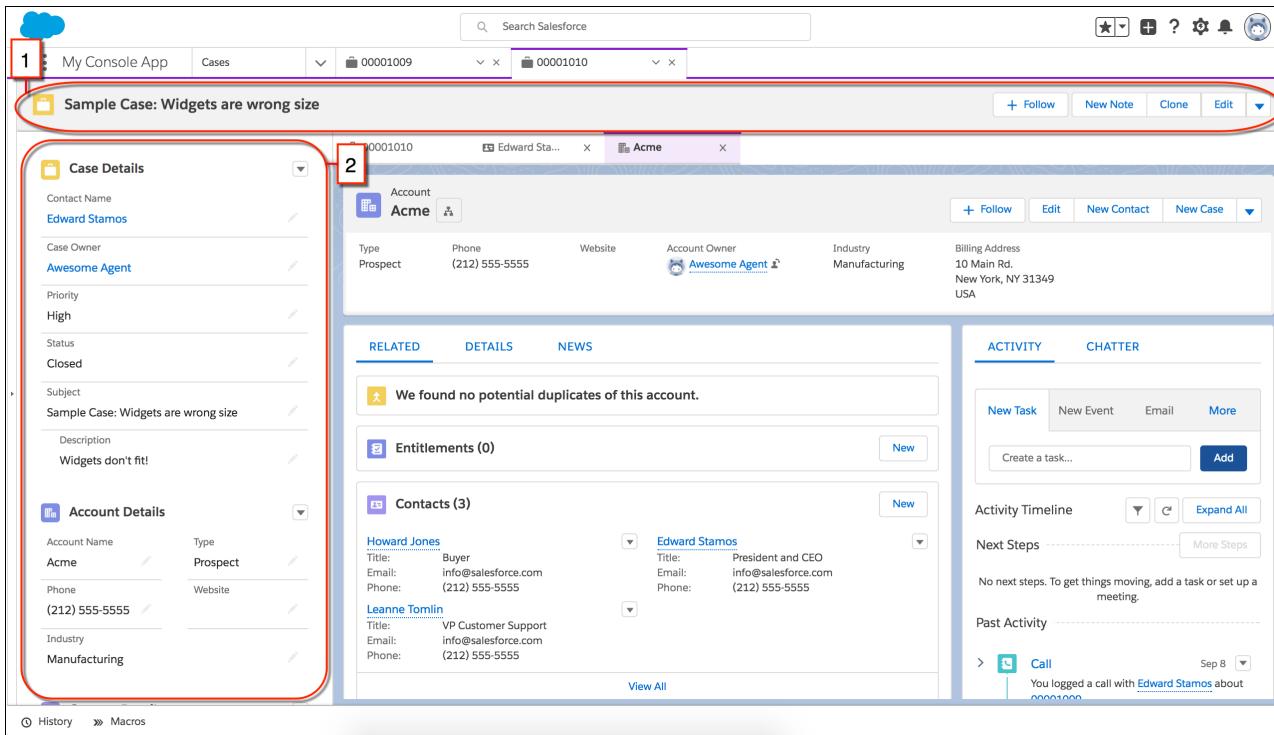
[Visualforce Developer Guide: \\$User.UITheme and \\$User.UIThemeDisplayed](#)

[Enable the Lightning Console UI Theme \(Critical Update\)](#)

Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again

A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Customize your Lightning console app with pinned region pages so that console users can view and work with record information on different subtabs. Choose from three templates to pin a page's header, left sidebar, or both. Previously, this feature was available only in Salesforce Classic consoles. This feature is new in Lightning Experience.

For example, this case record page uses the Console: Pinned Header and Left Sidebar template.



The header includes a Highlights Panel component (1), and the left sidebar includes two Related Record components that display case and account information (2). These pinned regions stay visible when the user views an account subtab for Acme.

To create a pinned region page, look for the following templates in the Lightning App Builder.

- Console: Pinned Header
- Console: Pinned Header and Left Sidebar
- Console: Pinned Left Sidebar

SEE ALSO:

[Create Pinned Region Pages for Your Console Apps](#)

Supercharge Console Productivity with Quick Text and Macros

Console apps already make your users productive, but we added tools to make them Productivity Rock Stars. Say hello to quick text and more powerful macros. These features are new in Lightning Experience.

SEE ALSO:

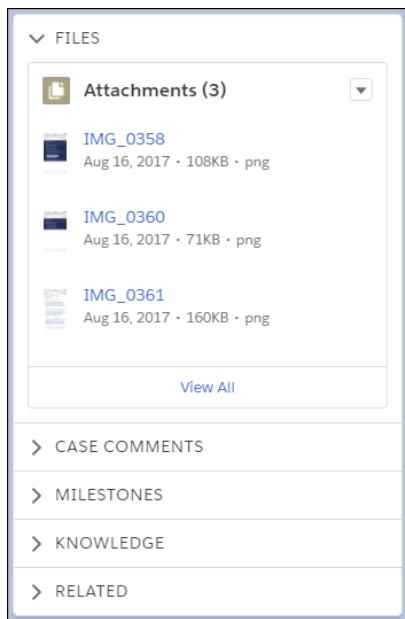
[Let Macros Do Your Work Everywhere](#)

[Increase Your Efficiency with Quick Text](#)

Reduce the Noise on Your Console Pages with Collapsible Sections

Organize and present information in sections that collapse and expand by customizing your Lightning console app pages with the Accordion component. Only one section is expanded at a time, so your console users can focus on the information they're working with. This feature is new in Lightning Experience.

Here's an Accordion component with five sections, and the Files section is expanded by default.



SEE ALSO:

[Organize Components into Collapsible Sections](#)

Search: More Ways to Refine Your Search Results

Filters are here in Lightning Experience, starting with accounts and files. We also improved the Top Results page, which shows the results for the objects most relevant to you at the top. And, as always, more objects are searchable.

IN THIS SECTION:

[Fine-Tune Account and File Search Results with Filters](#)

You can now filter search results for accounts and files. Make your initial search as broad as you want, then apply filters to focus the results. This change applies to Lightning Experience only.

[See More Relevant Objects First in Top Results](#)

Top Results lists the most relevant results for your most frequently used objects. The improved ordering of objects means less scrolling and clicking around to the object you want and more getting work done. This change applies to Lightning Experience only.

[Get Search Results for More Objects](#)

Email Message, Folder, Return Order, Return Order Line Item, and Survey are searchable. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

SEE ALSO:

[Enable Self-Service Search Index Encryption from Setup](#)

EDITIONS

Available in: **All Editions**
except Database.com

Fine-Tune Account and File Search Results with Filters

You can now filter search results for accounts and files. Make your initial search as broad as you want, then apply filters to focus the results. This change applies to Lightning Experience only.

On the search results page, filters appear when you click **Accounts** or **Files** under the Search Results header. The results update as you apply each filter (1). You can see which filters are applied above the search results (2).

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a global search bar with the term "acme". Below it is a navigation bar with icons for Sales, Home, Opportunities, People, Leads, Tasks, Campaigns, Files, and More. On the left, a sidebar titled "SEARCH RESULTS" shows "Top Results" with a list where "Accounts" is highlighted with a red box and the number "1" is overlaid. Under "REFINE BY", there are fields for "Account Name" (empty), "Owner Last Name" containing "smith" with a red box and the number "1" overlaid, and "Owner First Name" (empty). The main content area shows a table titled "Accounts" with 3 results, filtered by Owner Last Name and sorted by Relevance. The table has columns for ACCOUNT NAME, OWNER LAST NAME, OWNER FIRST NAME, INDUSTRY, and PHONE. The results are: Acme -- Palo Alto (Smith, Phil, Manufacturing, (650) 555-9875), Acme (Smith, Phil, Manufacturing, (510) 555-9055), and Acme -- Brooklyn (Smith, Phil, Manufacturing, (212) 555-6565). The number "2" is overlaid on the header of the table.

For Files, you can filter the Title, Size, File Extension, Last Modified Date, Owner, and Created Date fields. For Accounts, you can filter all fields except long text area and encrypted text fields. Add the fields you want to filter to the Search Results layout.

When you apply a new filter, the sort order of the previous search results isn't saved. Filters aren't saved when you enter a new search term in the global search box.

SEE ALSO:

[Salesforce Help: Refine Search Results in Lightning Experience](#) (can be outdated or unavailable during release preview)

See More Relevant Objects First in Top Results

Top Results lists the most relevant results for your most frequently used objects. The improved ordering of objects means less scrolling and clicking around to the object you want and more getting work done. This change applies to Lightning Experience only.

In Top Results, objects are ranked according to the following factors.

- Frequency—Prioritizes objects that you use most often.
- Search term—Prioritizes objects that are commonly associated with a search term. For example, a person's name is more commonly associated with contact or user objects.

SEE ALSO:

[Salesforce Help: How Are Search Results Ordered](#) (can be outdated or unavailable during release preview)

Get Search Results for More Objects

Email Message, Folder, Return Order, Return Order Line Item, and Survey are searchable. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Object	Salesforce Classic	Lightning Experience	Salesforce Mobile Web	Salesforce for iOS and Android
Email Message	✓	✓		
Folder		✓		
Individual	✓	✓	✓	✓
Return Order	✓	✓	✓	✓
Return Order Line Item	✓			
Survey	✓	✓	✓	✓

For the Product object, the Stock Keeping Unit field is now searchable.

SEE ALSO:

[Salesforce Help: Searchable Objects and Fields](#) (can be outdated or unavailable during release preview)

Get Up to Date on Your Lightning Experience Readiness

Run your Readiness Check lately? Even if you've run it before, run it again. We're releasing updates throughout Spring '18 to give you the latest recommendations, more user impact details, and a redesigned summary page that includes improved readiness statuses. Plus, Premier and Signature Success Plan customers see content customized exclusively for their program. These changes apply to both Lightning Experience and Salesforce Classic.

Our updated recommendations include new advice on lookup filters, Lightning Knowledge, and Visualforce items. Check out the Visualforce release notes for more information on improvements to that report.

Also in the Readiness Report, we've provided details about how we count user impact for each feature. That way, you can interpret your usage data based on how you use Salesforce to make informed decisions about who's ready for rollout. To review the details, click the question mark icon near your user impact data.

Starting in late February 2018, the report includes a redesigned report summary, called "Which Features Are Ready?" The new summary determines a more granular readiness status for each section, giving you more detail about what needs more attention. Each status is color-coded, offering a visual indicator for interpreting your report at a glance. You can also find statuses sprinkled throughout the report, indicating the readiness of individual Salesforce customizations.

Also starting in late February 2018, Sales and Service Cloud customers on Premier and Signature Success Plans get customized reports with exclusive resources. Customers are presented with specific Accelerator programs, designed to help with different aspects of their move to Lightning Experience.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Check back later to learn about more improvements to come in Spring '18.

SEE ALSO:

[Simplify Your Visualforce Lightning Experience Rollout](#)

Change in User Impact Counts for the Readiness Check

Starting in February 2018, your Readiness Report includes only some types of user licenses in user impact counts. These changes apply to both Lightning Experience and Salesforce Classic.

- Chatter Only (Chatter Plus)
- Company Community User
- Lightning Platform App Subscription
- Lightning Platform - One App
- Knowledge Only User
- Salesforce
- Salesforce Platform

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

If you've got users on other license types, consider their move to Lightning Experience by taking a manual inventory of the features and customizations they're using.

Deactivate Orgs You Don't Use

When an org has outlived its usefulness and it's time to move on, you can deactivate it. When you deactivate an org, you have 30 days to change your mind and reactivate it. After 30 days, the org is locked, and you must contact Salesforce Customer Support to reactivate it. After 60 days, the org is permanently deleted from Salesforce servers.

From Setup, you can deactivate an org from the Company Information page.

If the org has released a managed package, you can't deactivate it. Contact Salesforce Customer Support for assistance.

EDITIONS

Available in: **Developer** and **Database.com** Editions

USER PERMISSIONS

To view company information

- View Setup and Configuration

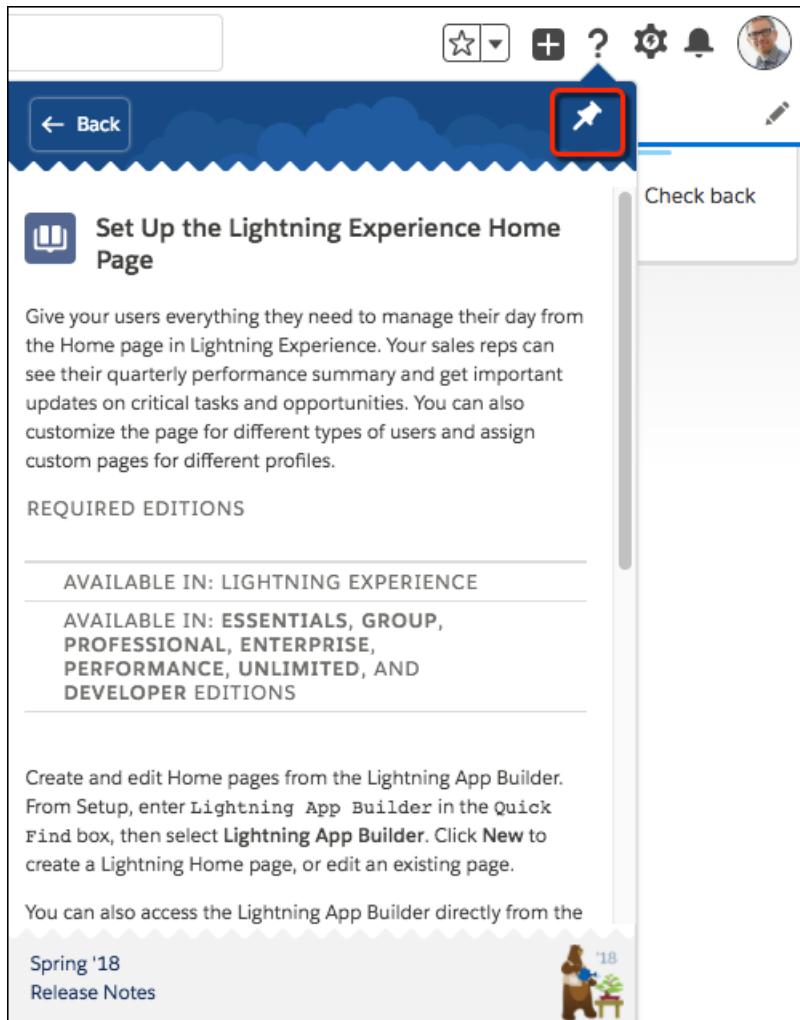
To deactivate an org

- Modify All Data

View Help Topics Wherever You Are in Lightning Experience

Looking for help in Salesforce? Get it without leaving the page you're on. In the Lightning Experience Help menu, click a help topic to preview it directly in the Help menu. Pin it to keep it open while you work. This change applies to Lightning Experience only.

When you click a help topic () in the Help menu, the topic opens in the Help menu. The menu's Trailhead theme helps put you in a learning mood. To keep the topic open while you work, click the pin.



Set Up the Lightning Experience Home Page

Give your users everything they need to manage their day from the Home page in Lightning Experience. Your sales reps can see their quarterly performance summary and get important updates on critical tasks and opportunities. You can also customize the page for different types of users and assign custom pages for different profiles.

REQUIRED EDITIONS

AVAILABLE IN: LIGHTNING EXPERIENCE

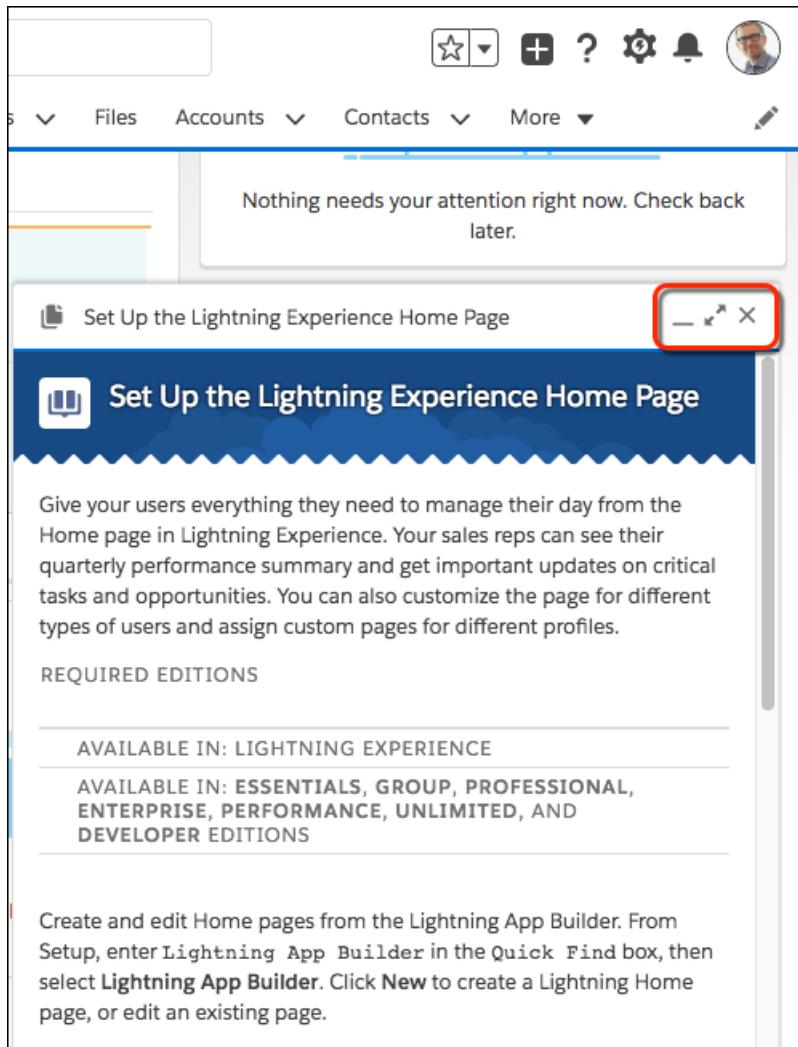
AVAILABLE IN: ESSENTIALS, GROUP, PROFESSIONAL, ENTERPRISE, PERFORMANCE, UNLIMITED, AND DEVELOPER EDITIONS

Create and edit Home pages from the Lightning App Builder. From Setup, enter **Lightning App Builder** in the Quick Find box, then select **Lightning App Builder**. Click **New** to create a Lightning Home page, or edit an existing page.

You can also access the Lightning App Builder directly from the

Spring '18
Release Notes

The topic stays available at the bottom of your screen. You can minimize it, expand it, or close it.

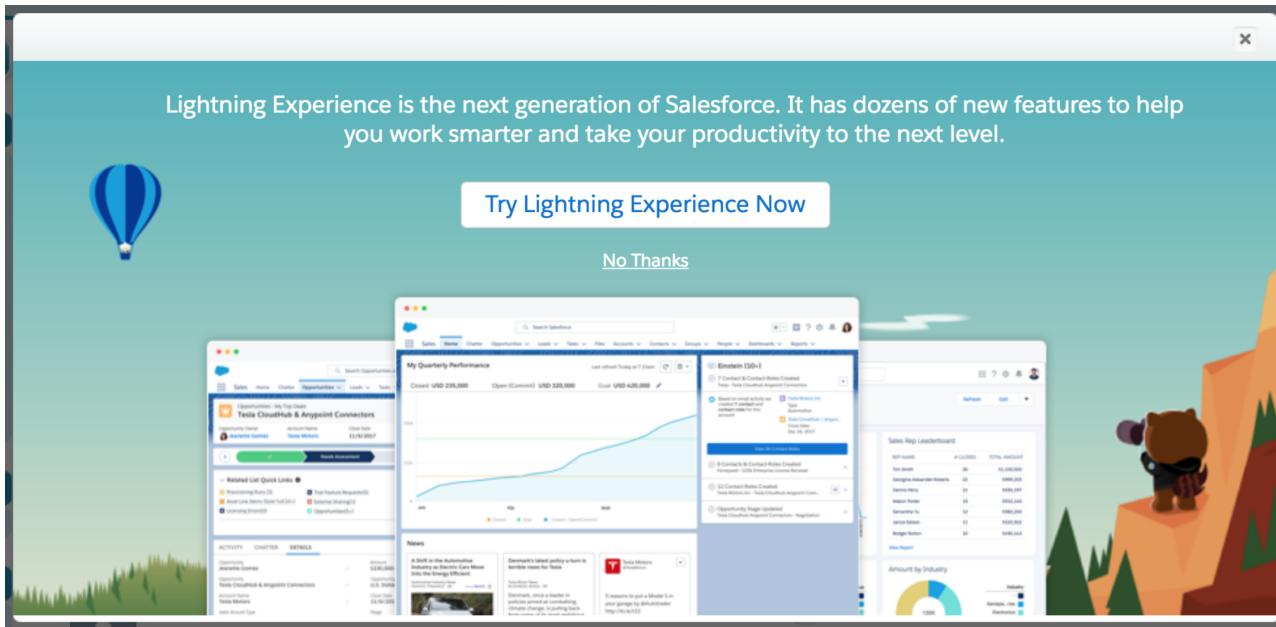


If you prefer to view the Help topic in our documentation pages, open it in a new tab using the link at the bottom of the Help menu.

Popup Helps You and Your Users Adopt Lightning Experience

If you've enabled Lightning Experience, we're here to help you and your users make the move. Starting on January 15, your eligible users still using Salesforce Classic are prompted to give Lightning Experience a shot.

Here's how it works. Users with access to Lightning Experience and with their language set to English see a popup message to try it out. The user can click the **Try Lightning Experience Now** link to switch to Lightning Experience. Or users can click **No Thanks** and take a short survey to let us know why they're not ready to switch. If the user closes the popup without clicking a link, it shows up again up to three times.



 **Note:** Users on Internet Explorer 11 without extended IE11 support don't see the popup.

Manage User Onboarding in a Single Place

When you enable Lightning Experience, we're here to help you and your users work faster and smarter. Starting on April 10, 2018, users that you've granted access to Lightning Experience are now offered contextual help on how to use common features, such as tasks and calendar. The learning prompts appear only when the specific feature is being used in Salesforce Classic. We'll be rolling out these training tips throughout 2018 to make learning and onboarding easier. This change applies to Lightning Experience only.

We're also releasing a new setup page where you can control which learning prompts display. Choose what works best for your Lightning Experience rollout plan. In Lightning Experience Setup, enter *Onboarding & Assistance* in the Quick Find box.

Editions

Available in: **Group, Professional, Enterprise, Performance, Developer, and Unlimited** Editions

The screenshot shows the Task Detail page for a task named "Follow up meeting". The page includes fields for Assigned To (Admin User), Subject (Follow up meeting), Due Date, Comments, Status (Not Started), Priority (Normal), and System Information (Created By: Admin User, Last Modified By: Admin User). Below the main content, there is an "Attachments" section with a message stating "No records to display". In the bottom right corner of the page, a blue callout bubble contains the text "Tasks are better in Lightning. Check it out!" and a link "Show Me This Task in Lightning Experience".

SEE ALSO:

[Salesforce Help: Encourage Users to Work in Lightning Experience](#)

Choose to Send Contact Information with Your Feedback

When you give feedback to Salesforce via the Help menu, you can choose to send your contact information. This change applies to Lightning Experience only.

We always appreciate feedback, and sometimes we want to contact you about your comments and questions. When you send us your thoughts through the feedback link in the Help menu, you can choose to include your contact information.

The screenshot shows the Salesforce Help & Training page. On the left, there's a sidebar with links like 'Get Started with Salesforce', 'Welcome to the Lightning Experience (English Only)', and 'Search Help & Training'. Below that is a section titled 'LEARN MORE WITH TRAILHEAD' with links to 'Make the Move to Lightning Experience', 'Get Started with Lightning Experience', and 'Go to Trailhead'. At the bottom of this sidebar are links for 'Get Support', 'Give Feedback about Salesforce' (which is circled in red), and 'View Keyboard Shortcuts'. A small icon for 'Spring '18 Release Notes' is also present.

A large modal window titled 'Give Feedback about Salesforce' is open on the right. It contains a text area labeled 'Comments' with a placeholder 'Max 4000 chars.' and a checked checkbox that says 'Contact me about my feedback. I understand that Salesforce will receive and can use my name, email address, and user ID to contact me.' This checkbox is also circled in red. At the bottom of the modal are 'Cancel' and 'Submit' buttons.

Switch to Lightning Experience with One Fewer Click

Use the convenient link in the header to quickly move between user interfaces. Only users enabled for Lightning Experience see the link. This change applies to Lightning Experience only.

Here's the new way to switch to Lightning Experience in Salesforce Classic.



For consistency, we've kept the old Switcher in the dropdown menu when you click your name.

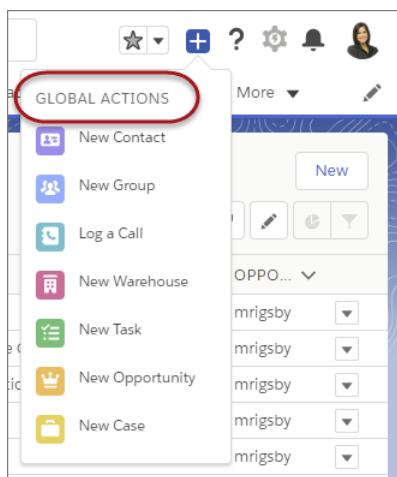
EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Developer, and Unlimited** Editions



The Global Actions Menu Has New Header Text

The Global Actions menu contains all kinds of global actions, not just Create a Record type actions. To clarify that, we changed the menu's header text from "Create" to "Global Actions." This change applies to Lightning Experience only.



EDITIONS

Quick actions available in:
Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer
 Editions

Evaluate Your Implementation with Salesforce Optimizer

We're making updates to the Salesforce Optimizer report throughout the release. These changes apply to both Lightning Experience and Salesforce Classic.

Starting in February 2018, Optimizer evaluates only the following user licenses.

- Chatter Only (Chatter Plus)
- Company Community User
- Lightning Platform App Subscription
- Lightning Platform - One App
- Knowledge Only User
- Salesforce
- Salesforce Platform

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer**
 Editions

Starting in February 2018, Optimizer evaluates whether you enabled My Domain in your org.

Starting in April 2018, Chatter adoption in Salesforce mobile apps are no longer evaluated.

Force.com Is Now Lightning Platform

In 2007, we launched Force.com, our core platform technology. We're changing the name to Lightning Platform because, in the past 10 years, it's become so much more. It will take some time to see every reference to Force.com removed from our product, but from here on out, it's Lightning Platform.

Lightning Experience: A Modern and Intelligent User Experience

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

IN THIS SECTION:

[Lightning Experience Features in This Release](#)

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

[What's Different or Not Available in Spring '18 Lightning Experience Features](#)

For new Lightning Experience features and enhancements, review these topics to see if any functionality that's critical to your business is limited or unavailable in this release.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Lightning Experience Features in This Release

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

[Lightning Experience: A Modern and Intelligent User Experience](#)

Salesforce Overall

[Get Guidance for Data Protection and Privacy Regulations](#)

[Store Certain Data Privacy Preferences](#)

[Supercharge Your Productivity with Personalized Navigation in Lightning Experience](#)

[Show Your True Colors with Themes in Lightning Experience](#)

[Gather Feedback with Salesforce Surveys \(Generally Available\)](#)

[Enable the New URL Format for Lightning Experience and the Salesforce Mobile App \(Critical Update\)](#)

[Boost Productivity with Quick Text and Macros](#)

[Get Record Detail Information at a Glance](#)

[Lightning Console Apps: Web Tabs, Pinned Region Lightning Pages, and More](#)

[Get Up to Date on Your Lightning Experience Readiness](#)

[Change in User Impact Counts for the Readiness Check](#)

[Deactivate Orgs You Don't Use](#)

[View Help Topics Wherever You Are in Lightning Experience](#)

[Popup Helps You and Your Users Adopt Lightning Experience](#)

Manage User Onboarding in a Single Place

Choose to Send Contact Information with Your Feedback

Switch to Lightning Experience with One Fewer Click

The Global Actions Menu Has New Header Text

Evaluate Your Implementation with Salesforce Optimizer

Force.com Is Now Lightning Platform

Search

Fine-Tune Account and File Search Results with Filters

See More Relevant Objects First in Top Results

Get Search Results for More Objects

Sales

Sales Cloud Einstein: A Smarter Sales Process at Every Step

Salesforce CPQ and Billing: Quote and Payment Improvements

Pardot: Campaign Alignment (Beta), Campaign Engagement (Beta), Lead–Account Matching, Support for Japanese

Core Sales Features

Leads: LinkedIn Integration and Conversion Configurability

Campaigns: Faster Flow for Adding Members, Track Campaigns with Path, Customizable Campaign Influence Reporting, Pardot Campaign Alignment, and Engagement History

Path: Pick Your Own Path

Accounts: Path, Lead–Account Matching, Better Email Support for Person Accounts, and More

Opportunities: Opportunity Splits, Opportunity Product Name Visibility, Price Book Selection, and More

Products: New Customization Option and Speedier Product Addition to Price Books

Enterprise Territory Management: See More Territory Information

Contacts: Contact Roles and Improved Contact Hierarchy Access

Productivity Features

Sales Console: Pinned Regions, Quick Text, Macros, and More

Lightning Dialer: Call Monitoring, “Do Not Call” Numbers

Inbox: Scheduling Improvements, Email Tracking, and Productivity Updates

Email Experience: Improvements to List Emails, Updates to Creating Emails, and Other Enhancements

Activity Timeline: Updated Timeline and Expanded Einstein Emails

Activity Reminders: Event Reminders, More Reminder Control, and a Clear-All Reminder Option

Calendar and Events: Attendee Auto-Relate, Attendee Access for More Reps, and Improvements to Shared Events

Home: Do More with the Deals Component

Data Quality

Stay on Top of Duplicate Records by Using Duplicate Jobs

Use Discover Companies to Put a Treasure Trove in Your Sales Pipeline

Google Integration

[Lightning for Gmail: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence](#)

[Lightning Sync for Google: More Sync Options, More Event Attendees Availability, and Redesigned Setup](#)

Microsoft® Integration

[Lightning for Outlook: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence](#)

[Lightning Sync for Microsoft® Exchange: More Sync Options, More Event Attendees Availability, and Redesigned Setup](#)

[Salesforce for Outlook: Bug Fixes Available](#)

Other Changes in the Sales Cloud

[Forecasts Grid Column Widths Are Adjustable in Lightning Experience](#)

[New Permission Required to Access the Forecasts Page in Lightning Experience](#)

[UK and Ireland Contact Data Removed from Data.com Connect](#)

[Zero Quantity Order Lines Allowed on Order Products](#)

Service

[Service Cloud Essentials: Customer Service for Small-But-Mighty Businesses](#)

[Service Console: Pinned Region Pages, Quick Text, and Mass Quick Actions](#)

[Snap-Ins for Mobile Apps: SDK Enhancements](#)

[Social Customer Service: Learn More About Your Customers with the Conversations Component](#)

[CTI: The VF Component support:clickToDial Now Works in Lightning Experience](#)

Knowledge

[Insert Article Content into Case Emails](#)

[Set Up Draft Approval in Lightning](#)

[Reassign Drafts to New Assignees](#)

[Give Live Agent Users Access to Knowledge](#)

[Import Translation Files with Ease](#)

Field Service

[Track Product and Inventory Returns with Return Orders](#)

[Filter Related Lists on Service Reports \(Beta\)](#)

[View, Email, and Delete Service Reports in Lightning Experience](#)

[Add Page Numbers to Service Reports](#)

[View and Manage Service Crews in the Salesforce App](#)

[Create Service Resources for Omni-Channel Support Agents \(Beta\)](#)

[Field Service Managed Package: Service Crews and Scheduling and efficiency, Oh My](#)

[Field Service for Mobile: Profile-Based Settings, Flow Enhancements, and the iOS App Turns 4.0](#)

Productivity

[Increase Your Efficiency with Quick Text](#)

[Let Macros Do Your Work Everywhere](#)

[Meet the Updated Macros Utility](#)

[Use Email Templates and Attachments in Macros](#)

[Use Quick Text in Macros](#)

[Open the Macros Utility with a Keyboard Shortcut](#)

[Create Macros Faster in the Macro Builder and Do More](#)

Cases

[Mass Quick Actions in Lightning Experience](#)

[Email Search has Finally Arrived](#)

[Reply and Forward Email](#)

[Email Default Publisher is Now HTML](#)

[Case Path for Lightning Experience](#)

[Send Actions Setup Page is Available in Lightning Experience](#)

Live Agent

[Chat Faster with Quick Text in Lightning Experience](#)

[Chat Smarter with Lightning Knowledge](#)

[Delete Waiting Chat Transcripts](#)

[Seamless Releases for Chats](#)

Omni-Channel

[Get the Right Work to the Right Agent, Right Away, with Skills-Based Routing \(Beta\)](#)

[Use External Routing \(Beta\) in Lightning Experience](#)

[Monitor Your Support Center with Omni-Channel Supervisor in Lightning Experience \(Generally Available\)](#)

[Let Supervisors See Only What Matters in Omni-Channel Supervisor \(Beta\)](#)

[Use Omni-Channel Console Methods and Events in Lightning Experience \(Generally Available\)](#)

[Get More Done with Increased Routing Limits](#)

Snap-ins for Web

[Customize Pre-Chat with Lightning Components](#)

[Route Chats to a Button Based on Pre-Chat Responses](#)

[Be Proactive with Automated Chat Invitations](#)

[Fill In Pre-Chat Fields for Logged-In Visitors](#)

[Protect Customer Data Using Sensitive Data Rules](#)

[Keep Your Post-Chat Page in the Snap-In](#)

[Updates to Snap-Ins Setup and the Version 4.0 Code Snippet](#)

Other Changes

[Removed Personal Data from Web-to-Case and Web-to-Lead Emails](#)

[View a Person Account's Assets in Lightning Experience](#)

Analytics

[Einstein Analytics: Learning Adventures, Conversational Exploration, Einstein Data Insights](#)

Reports and Dashboards

[Lightning Experience Report Builder: Buckets, Cross Filters, and Summary Formulas \(Beta\)](#)

[Dashboards: Better Tables, Subscriptions, and New Design Options](#)

[Folders: Find and Favorite](#)

[Chart Enhancements for Reports and Dashboards in Lightning Experience](#)

Communities

[Put Power of AI in Your Community with Einstein Answers \(Pilot\)](#)

[Market to Your Members with Journey Builder for Communities \(Generally Available\)](#)

Lightning Communities

[Update Your Lightning Community](#)

[Build and Brand Your Community Faster](#)

[Quickly See Which Theme Layout a Page is Based On](#)

[Create and Manage CMS Connect \(JSON\) Connections and Content More Easily](#)

[Use Named Credentials with JSON connections in CMS Connect \(Beta\)](#)

[Keep Track of Events with Community Calendars](#)

[Gather Feedback from Your Community with the Survey Component](#)

[Help Customers Find Answers—and Deflect Cases—with Two New Components](#)

[Fill in Contact Information in Snap-Ins Chat for Your Community Members](#)

[Organize Your Community's Content Up to Eight Levels with Navigational Topics](#)

[Assign Audiences to Page Components](#)

[Use CRM Fields to Target Audiences](#)

[Use More Components with More Templates](#)

Security

[Enable Community Users to Self-Deactivate](#)

[Verify Community External Users' Identity](#)

[Set Different Login Policies for Salesforce and Community Users \(Beta\)](#)

[Sharing Sets for All Customer and Partner Licenses—Pilot](#)

Usability and Performance Improvements

[Call Workspaces Home](#)

[Optimize Account Roles to Improve Performance and Scale Your Org](#)

[Create Multilingual Communities in Community Builder](#)

[Improve SEO for Your Community Pages](#)

[Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

Chatter in Lightning Communities

- Add Style to Your Community Posts on the Go (Pilot)
- Add Hashtags to Polls
- Get In-App Notifications for Group Mentions
- Share Links to Posts with Your Community
- Get the Top-Five Questions You're Most Qualified to Answer (Pilot)
- Likes and Upvotes Are Counted Together
- Jump to Your Community from Email Notifications
- Do More in Community Streams from Your Internal Salesforce Org (Beta)
- Get More Streamlined Updates in the Last Activity Group List

Partner Central

- Hold Private Conversations in Your Partner Communities
- Track Partner Performance with the Partner Scorecard (Generally Available)
- Create and Personalize Partner Campaigns with Distributed Marketing
- Boost Channel Marketing ROI with Campaign Marketplace

New Guided Setups: Channel Programs, Campaign Marketplace, and Intelligent Sales Enablement

- Empower Channel Marketers by Sharing Preapproved Campaigns with Partners
- Manage Channel Membership and Measure Partner Performance
- Empower Your Sales Teams with Intelligent Sales Enablement

Community Analytics

- Know How Well Your Community Deflects Cases
- Feel Your Community's Vibe with the Sentiment Analysis Dashboard (Pilot)

Files in Communities

- Navigate Libraries with the Libraries Component (Generally Available)
- Allow Standard Users to Create Assets
- Collaborate with Community Members with Quip
- Preview Files on the Go
- Create Asset Files for Unauthenticated Users
- Upload Files with the File Upload Component and Cloud Flow Designer
- Skip Triggers and Validation Rules on Asset Files
- Delete Stored Credentials for Connected Sources

Other Changes in Communities

- Automate More Tasks with Process Builder and Workflow Rules
- Use Custom Mass Actions in the Engagement Queue
- Data Retention Shortened for Einstein Spam Detection (Pilot)
- Member Profile Component Now Called Member Profile and Settings

Chatter

Feeds

- [Follow What You Follow](#)
- [Get In-App Notifications for Group Mentions](#)
- [Share Links to Posts](#)
- [Apply a Filter and Make It Stick](#)
- [Do More in Community Streams from Your Internal Salesforce Org \(Beta\)](#)
- [Work with a Streamlined List of Rich Link Preview Domains](#)
- [Get Improved Performance with Optimized Chatter User Email Digests](#)
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Other Changes in Chatter

- [Get More Streamlined Updates in the Last Activity Group List](#)
- [Automate Chatter Tasks with Process Builder and Workflow Rules](#)
- [Use Hashtags in Polls](#)
- [Chatter Messenger Is Being Retired in Spring '18](#)
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Files

- [Access Files with the View List of Assets](#)
- [Allow Standard Users to Create Assets](#)
- [Create Asset Files for Unauthenticated Users](#)
- [Preview Files on the Go](#)
- [Add Library Members with Library Member Management \(Beta\)](#)
- [Set Up Quip for Better Integration with Salesforce](#)
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- [Organize Components into Collapsible Sections](#)
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- [Flow Distribution: Subtabs in Console Apps, Object-Specific Actions, and Dynamic Apex](#)
- [Paused Flow Interviews: Sharing, Record Association, Resume from Lightning Experience](#)

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- [New Formula Functions](#)

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- [Access Enhanced Profile Features in User Management Settings Node](#)

Salesforce Connect

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- [Track External Object Data Callouts with Event Log Files \(Pilot\)](#)
- [Retrieve and Deploy Compact Layouts for External Objects](#)
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[Grow Your Business Faster with the AppExchange Trailblazer Scorecard](#)

[Accept Bank Payments in AppExchange Checkout](#)

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[Deliver Millions of Events Per Day with High-Volume Platform Events \(Pilot\)](#)

[Handle Invalid Connections in Streaming API](#)

What's Different or Not Available in Spring '18 Lightning Experience Features

For new Lightning Experience features and enhancements, review these topics to see if any functionality that's critical to your business is limited or unavailable in this release.

Editions

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Search: Lightning Experience Considerations](#)

[Reports and Dashboards: Lightning Experience Considerations](#)

Search: Lightning Experience Considerations

Learn about the issues to expect when searching in Lightning Experience.

Only Account and File Search Results Can Be Filtered

Filtering isn't available for other objects. Salesforce recommends that users enter more specific search terms to see more relevant results.

The "exact phrase" and "limit to items I own" filter options aren't available on search results pages.

Reports and Dashboards: Lightning Experience Considerations

Learn about the issues to expect when using reports and dashboards in Lightning Experience.

Differences Between the Lightning Experience and Salesforce Classic Report Builders

Feature	Difference
Report Formats	In the Salesforce Classic report builder, you must choose a report format before grouping data. In the Lightning report builder, the report format automatically updates as you group report data. Tabular, summary, and matrix reports are all available, but you don't select the format before grouping the data.
Charts	The Lightning Experience report builder features the same charts as the report-view-page in Lightning Experience.
Customizing Granularity when Grouping by Date Fields	In the Lightning Experience When grouping records by a date field, you can't customize date granularity. For example, on the Opportunity report type, grouping by the Date Closed field always groups records by day, and Month Closed always groups records by month.

Features Not Available in the Lightning Experience Report Builder

These features aren't available in the beta version of the Lightning report builder, but we're working hard to implement them in a future release.

- Joined reports
- Row limit filters
- Dashboard Settings menu

Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements

New features and improvements deepen Einstein's ability to help you close deals, predict your bottom line, strengthen customer relationships, and more.

Here is the newest list of Einstein enhancements that help make Salesforce the world's smartest CRM.

Sales

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Einstein Opportunity Scoring: Artificial Intelligence for Opportunities (Generally Available)

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Einstein Lead Scoring: Clearer Predictive Factors and Detection of Rank and Department

Get a clearer view of the reasons behind each score. And see better scores with rank and department information. These changes apply to both Lightning Experience and Salesforce Classic.

Einstein Activity Capture: Send Emails from Org-Wide Email Addresses and See Microsoft Events in Salesforce

We added support for org-wide emails. Plus, reps can see their Microsoft events from their Salesforce calendars. These changes apply to Lightning Experience only.

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Setting up Sales Cloud Einstein is quicker than ever. We moved some things in Setup so that they're easier to find. Plus, we created a standard permission set to help you get reps up and running with Einstein. If you already use Sales Cloud Einstein, we updated the current permission set license. These changes apply to both Lightning Experience and Salesforce Classic.

Sales Cloud Einstein Analytics: Expanded Access and Updated Data

All Sales Cloud Einstein users have access to the Sales Analytics app, which includes all the Sales Cloud Einstein dashboards. Plus, we updated the Einstein Automated Contacts and Einstein Lead Scoring dashboards, but you need to complete a few steps to see those updates. These changes apply to Lightning Experience only.

Einstein Insights: Access Account and Opportunity Insights from Your Mobile Device (Pilot)

Einstein Insights are now available when you're on the go! Stay informed with insights about your accounts. See predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place. Reps can take action directly from the insights, including editing the related record or sending emails to relevant contacts. This change applies to Salesforce for iOS and Salesforce for Android.

Inbox: Get the Productivity of Inbox with Sales Cloud Einstein

Sales Cloud Einstein now includes Inbox, which lets reps integrate their email and calendar with Salesforce with a suite of productivity features. When your reps combine the efficiency of Inbox with the intelligence of Sales Cloud Einstein, there's no stopping them. This change applies to both Lightning Experience and Salesforce Classic.

Analytics

Einstein Data Insights: What Can Einstein Tell You About Your Report Data? (Pilot)

Reports show you data, but what does the data mean? Wonder no more! Introducing Einstein Data Insights: a smarter report. Einstein analyzes report data and summarizes key takeaways, comparisons, and trends with insightful charts and metrics. It's one-click data science! This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Create Einstein Discovery Datasets from Analytics Dataflows

Use an Einstein Analytics dataflow to create an Einstein Discovery dataset based on data from Salesforce objects, replicated objects, or existing datasets.

Use UTF-8 Character Sets with Einstein Discovery

Einstein Discovery now supports data that contains UTF-8 character encoding. You can upload and analyze data in any language that uses UTF-8 encoding, such as Arabic, Russian, or Hebrew.

Display Einstein Discovery Recommendations in a Salesforce Object (Pilot)

We are piloting native support for importing Einstein Discovery recommendations into a Salesforce object. Previously, it was necessary to install a managed package to enable the Writeback feature.

Communities

Put Power of AI in Your Community with Einstein Answers (Pilot)

When your customers come looking for answers in your community, they want accurate results that solve their issues quickly. Einstein Answers is here to help. When a community member asks a question, Einstein Answers looks through articles and past discussions in your community. After sifting through your community's data, Einstein Answers suggests answers to the community member's question. Power users, known as Answer Champions, review and rate the suggested answers and post good ones to the community.

Development

JWT Token Is Now Longer

The JWT tokens you use to call the API are now longer. You see this change whether you use the token web page at <https://api.einstein.ai/token> or generate it in code by calling the /oauth2/token endpoint.

Change API Endpoint to Maintain Access to Einstein Platform Services

All the Einstein Platform Services and functionality have a new address. We're deprecating the `api.metamind.io` endpoint. Update your code and tools to reference `https://api.einstein.ai`. You still have access to all the Einstein Platform Services, only the endpoint is changing.

Einstein Vision: Object Detection, Getting All Image Examples for a Label

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

Einstein Language: Learning Curve Metrics, Precision-Recall Curve, Getting All Text Examples for a Label

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

Trailhead

Trailhead: Einstein Intent API Basics

Build a deep-learning custom model to categorize text and automate business processes.

Sales: New and Improved Einstein Features, LinkedIn Integration for Leads, and Enhanced Productivity Tools

Get smarter with Einstein Forecasting and Einstein Opportunity Scoring. Use LinkedIn as a source for lead generation. Help reps be more efficient with call monitoring in Lightning Dialer, improved list email, and other tools.

IN THIS SECTION:

[Sales Cloud Einstein: A Smarter Sales Process at Every Step](#)

Use the improved Einstein Readiness Assessor to see if your org is ready to start using Sales Cloud Einstein. Say hello to Einstein Opportunity Scoring and Einstein Forecasting. Enjoy enhancements to Einstein Lead Scoring and Einstein Activity Capture. Get your sales teams up and running with Sales Cloud Einstein features and dashboards. These changes apply to both Lightning Experience and Salesforce Classic.

[Core Sales Features: More Features, More Sales](#)

Blaze your path to success even faster with new and improved features in core sales areas. Source new leads from LinkedIn. Find out how customers are engaging with your campaigns. Use Path to manage the life cycle of your accounts. Share credit for a deal with your team with Opportunity Splits in Lightning Experience. And many more features to help you close more deals. Most changes apply to Lightning Experience only, but we've tucked in a few gems for the Salesforce app and Salesforce Classic, too.

[Productivity Features: Sales Console Improvements, Call Monitoring, and Email Enhancements](#)

Help your reps maximize their productivity in Lightning Experience with a slew of console features, Call Monitoring in Lightning Dialer, and list email improvements.

[Data Quality: Global Duplicate Management, Company Search and Import](#)

Duplicate jobs give you control over duplicate accounts, contacts, and leads. And sales teams using Discover Companies can fill their pipeline with new prospects. These features are new in Lightning Experience.

[Google Integration: Flexible Record Creation, More Opportunity Insights, and More Sync Options](#)

Get your reps working their Salesforce deals directly from Gmail™ and Google Calendar™. Lightning for Gmail provides reps flexibility to add records from emails that don't match a person in Salesforce. More Einstein insights and auto-completed record fields get reps working faster. Plus, help reps stay productive with more sync features, like person account sync, a new sync direction, and more availability for event attendee sync. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Microsoft® Integration: Flexible Record Creation, More Opportunity Insights, and More Sync Options](#)

Get your reps working their Salesforce deals directly from Microsoft Outlook®. Lightning for Outlook provides reps flexibility to add records from emails that don't match a person in Salesforce. More Einstein insights and auto-completed record fields get reps working faster. Plus, help reps stay productive with more sync features, like person account sync, more sync directions, and more availability for event attendee sync. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Salesforce CPQ and Billing: Quote and Payment Improvements](#)

Deliver quotes, proposals, and contracts quickly and accurately. Automate your billing and payment process with flexible tools and terms. Salesforce CPQ and Billing offers an end-to-end solution for creating quotes, closing deals, settling invoices, and reporting revenue. Available in Lightning Experience and Salesforce Classic.

[Pardot: Campaign Alignment \(Beta\), Campaign Engagement \(Beta\), Lead–Account Matching, Support for Japanese](#)

Sync Pardot and Salesforce campaign records, see how campaign members are engaging with campaigns, match leads to accounts, and use Pardot in Japanese. These changes apply to Lightning Experience only.

[Other Changes in the Sales Cloud](#)

We've added adjustable column widths in the forecasts grid and a new permission required to access the forecasts page in Lightning Experience. We removed data for contacts in the UK and Ireland from the Data.com Connect database and we added zero quantity order lines to order products.

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 **Note:** Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

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Einstein Readiness Assessor: Find Out Whether You're Ready for Einstein

With the Einstein Readiness Assessor, it's now easier to see whether you're ready to start using Sales Cloud Einstein. And, if not, what steps to take. This change applies to Lightning Experience only.

1. From Setup, enter **Readiness Assessor** in the Quick Find box, then select **Readiness Assessor** under Einstein Sales.
2. Click **Assess Your Sales Cloud Einstein Readiness**.
3. Follow the instructions to let Salesforce access your data.

USER PERMISSIONS

To run the Sales Cloud Einstein Readiness Assessor:

- Customize Application

When the assessment is done, we email you a personalized Sales Cloud Einstein readiness report, which is also available from the Files tab in Salesforce.

SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Einstein Opportunity Scoring: Artificial Intelligence for Opportunities (Generally Available)

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IN THIS SECTION:

[Prioritize Your Way to More Business \(Generally Available\)](#)

Let artificial intelligence help you and your team prioritize opportunities so that you can close more deals. This feature is new in Lightning Experience and Salesforce Classic.

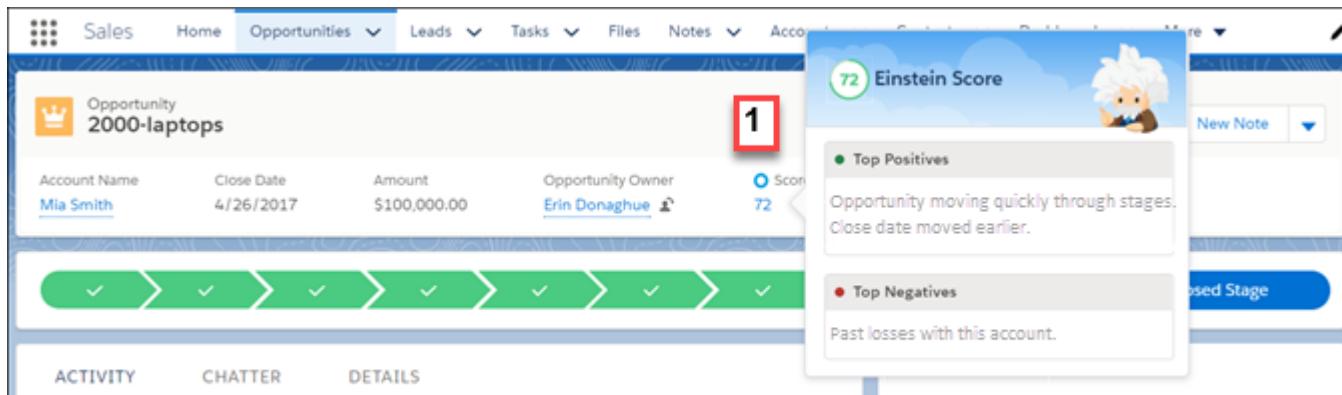
[Set Up Einstein Opportunity Scoring \(Generally Available\)](#)

Give your sales team access to scores that help them prioritize opportunities and close more deals. Opportunity scores are available on opportunity records and list views. If you use Collaborative Forecasts, scores are also available on the forecasts page. This feature is new in Lightning Experience and Salesforce Classic.

Prioritize Your Way to More Business (Generally Available)

Let artificial intelligence help you and your team prioritize opportunities so that you can close more deals. This feature is new in Lightning Experience and Salesforce Classic.

Opportunity scores are based on the record details, history, and related activities of the opportunity and related account. Information about the opportunity's owner, such as yearly win rates, is also used to calculate the score.



In Lightning Experience, the score is shown on the compact layout of opportunity records (1). Hover over the score to see a list of factors that contribute to the score.

In Salesforce Classic, the score and contributing factors are shown on the record detail of opportunity records.

	OPPORTUNITY NAME	ACCOUNT NAME	OPPORTUNITY SCORE	AMOUNT	STAGE	CLOSE DATE
1	Insightor Opp #wQJII	Ace Hardware	97	\$60,000.00	Closed Won	5/10/2017
2	Insightor Opp #oQNwu	Insightor Account #b3SUt	93		Prospecting	5/13/2017
3	2000-laptops	Mia Smith	92	\$100,000.00	Closed Won	4/26/2017
4	Insightor Opp #Cl3Ef	Insightor Account #wDW65	82		Prospecting	8/10/2017
5	Insightor Opp #CPn1H	Insightor Account #T6FjM	78		Prospecting	8/21/2017
6	Global Media - 400 Widgets	Global Media	78	\$40,000.00	Id. Decision Ma...	1/11/2015
7	Insightor Opp #DI4to	Ursa Major	77	\$650,000.00	Closed Won	5/10/2017
8	Insightor Opp #P89Qs	Insightor Account #8qF7f	74		Prospecting	8/21/2017

You can add the Opportunity Score field to opportunity list views (2). In Lightning Experience, hover over the score in the list view to see the factors that contribute to the score. In Salesforce Classic, the contributing factors aren't available from the list views. Instead, navigate to the opportunity record detail page.

If you use Collaborative Forecasts, you can add opportunity scores to the opportunity list on the forecasts page.

SEE ALSO:

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Give your sales team access to scores that help them prioritize opportunities and close more deals. Opportunity scores are available on opportunity records and list views. If you use Collaborative Forecasts, scores are also available on the forecasts page. This feature is new in Lightning Experience and Salesforce Classic.

1. If you already use Sales Cloud Einstein, add the Einstein Opportunity Scoring app permission, available later in February 2018, to your Sales Cloud Einstein permission set.
2. From Setup, enter *Einstein Opportunity Scoring* in the Quick Find box, and then select **Einstein Opportunity Scoring**.
3. Click **Enable**.
4. In Lightning Experience, add the Score field to your customized compact layout for opportunities. Salesforce automatically adds this field to default compact layouts. In Salesforce Classic, add the score field to your customized page layout for opportunities. Salesforce automatically adds this field to default page layouts.
5. Add the Opportunity Score field to public opportunity list views. To get the most out of Einstein Opportunity Scoring, ask your sales teams to add this field to their own opportunity list views.
6. If you use Collaborative Forecasts, add the Opportunity Score field to the opportunity list on the forecasts page.

USER PERMISSIONS

To set up Einstein Opportunity Scoring:

- Customize Application AND Modify All Data

SEE ALSO:

[Salesforce Help: Set Up Sales Cloud Einstein \(can be outdated or unavailable during release preview\)](#)

[Prioritize Your Way to More Business \(Generally Available\)](#)

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Einstein Forecasting: Intelligent Predictions About Your Sales Teams (Beta)

Let Einstein take the guesswork out of forecasting. Use artificial intelligence to get more certainty and visibility into how your sales teams are doing. This feature is new in both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Get More Certainty and Visibility into Your Forecasts \(Beta\)](#)

Einstein improves your forecasting accuracy with predictions about your sales team's opportunities based on past data. In Lightning Experience, see key performance indicators (KPIs), helpful forecasting graphs, and up-to-date metrics that are refreshed multiple times a day. In Salesforce Classic, stay on top of your team's forecast predictions with weekly reports. This feature is new in both Lightning Experience and Salesforce Classic.

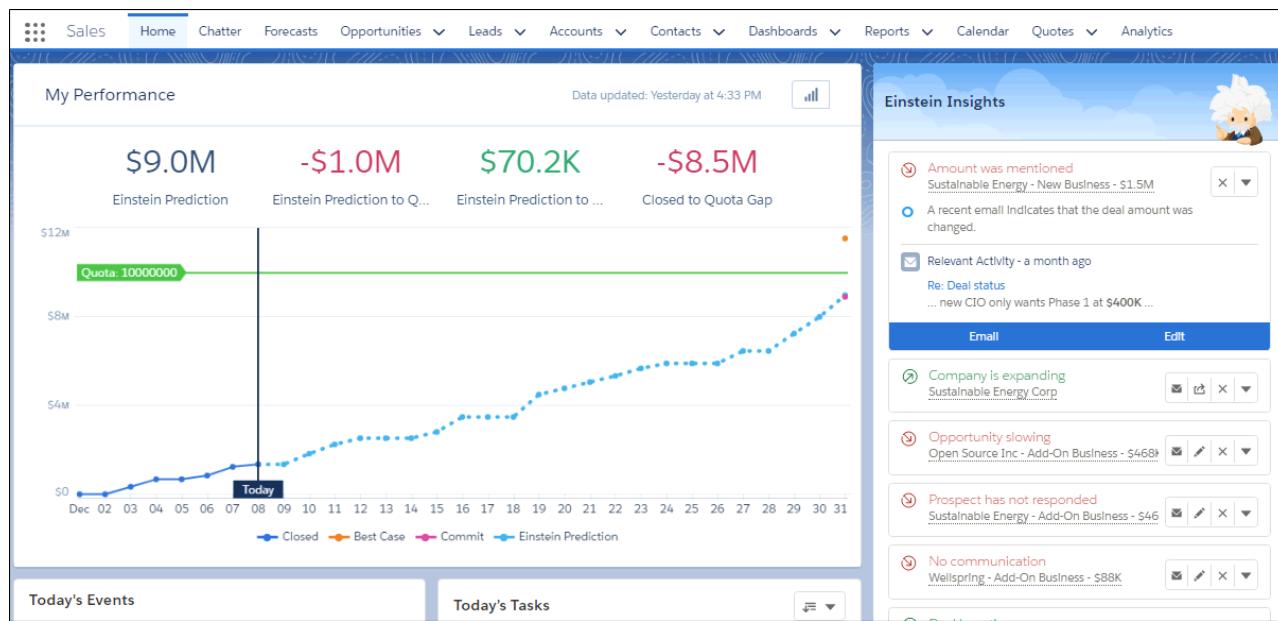
[Set Up Einstein Forecasting \(Beta\)](#)

Improve your org's forecasting accuracy. Add the Einstein Forecasting app permission and enable the feature. This feature is new in both Lightning Experience and Salesforce Classic.

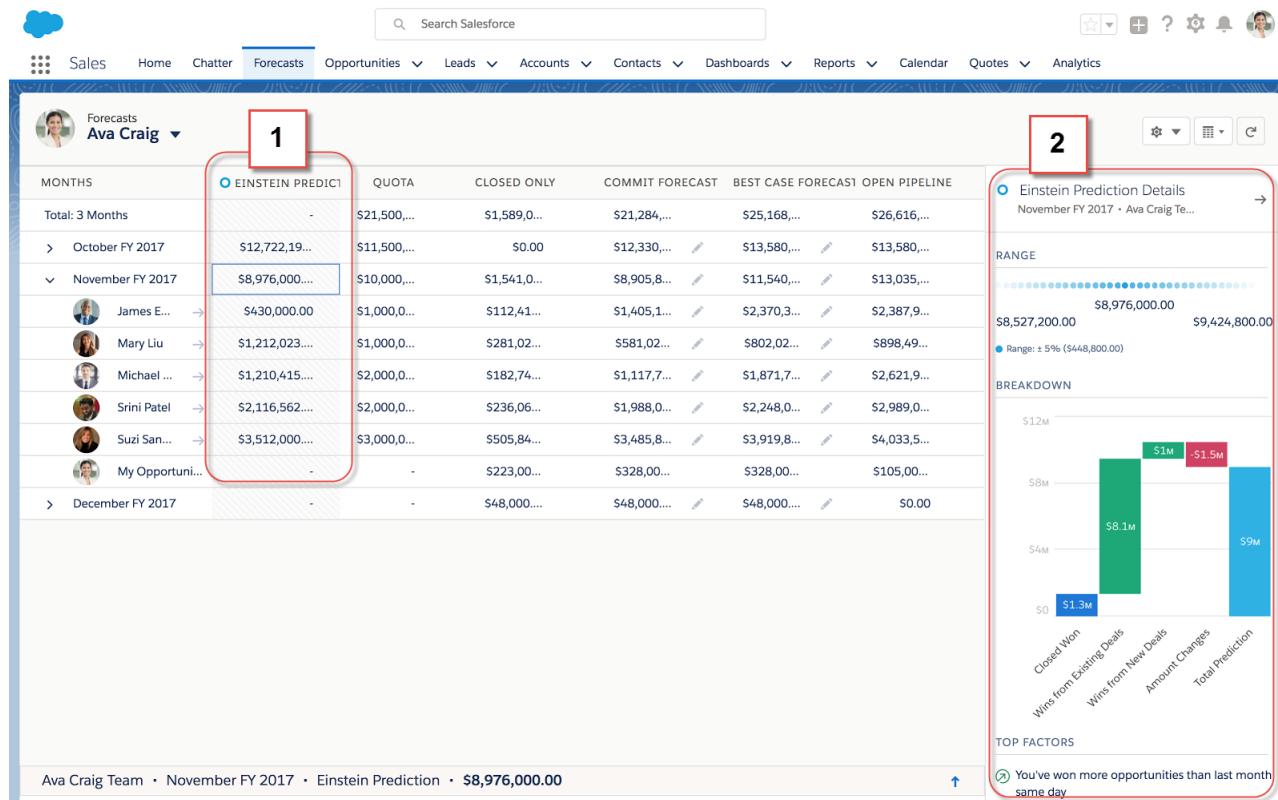
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 **Note:** This release contains a beta version of Einstein Forecasting, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. Einstein Forecasting isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Einstein Forecasting in the [IdeaExchange group in the Trailblazer Community](#).

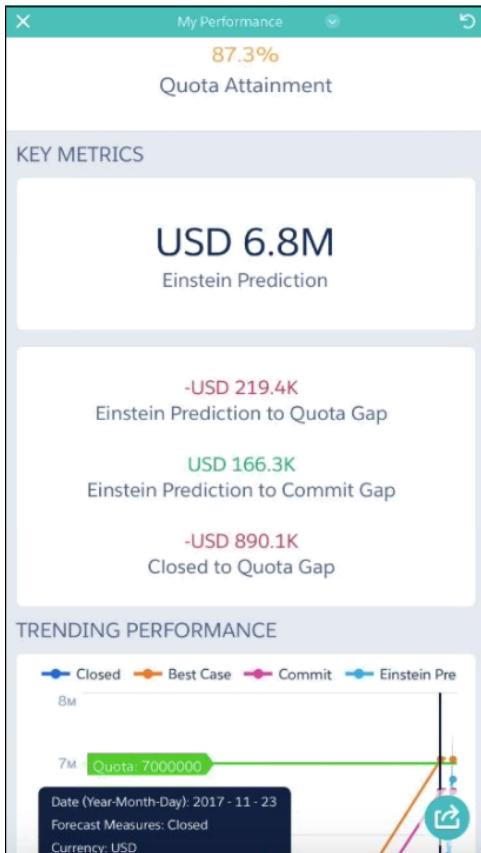


See a prediction graph that shows your team's past opportunities and predictions about future performance. This includes Einstein's prediction compared to your sales target, and comparisons based on your committed opportunities and best-case forecast. You can also see KPIs above the graph.



On the forecasts page, the Einstein Prediction field (1) shows the median predicted amount for each team and team member. Predictions are based on all open opportunities with close dates by the end of the month. Sometimes a prediction isn't shown, such as when sufficient historical data isn't available or the prediction range is too large to be useful. You can also see more details about each prediction (2), such as the range of the prediction value and contributing factors.

Predictions are always in US dollars, unless you're using multiple currencies. In that case, the amounts are converted to the currency selected by the user, using the static conversion rate you've set.



You can also access Einstein Forecasting from your mobile device using the Analytics app. See key performance metrics and a prediction graph while you're on the go.

Einstein Forecasting is available for managers only and is currently limited to orgs that forecast by month. Opportunity splits are not supported.

SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Set Up Einstein Forecasting (Beta)

Improve your org's forecasting accuracy. Add the Einstein Forecasting app permission and enable the feature. This feature is new in both Lightning Experience and Salesforce Classic.

To use Einstein Forecasting, your org must have:

- Collaborative Forecasting enabled and forecast hierarchy set up
- Two years of opportunity history using the standard Opportunity object and the Amount and Close Date fields
- Forecasts set by month, not by quarter, using the Opportunities (Revenue) forecast type
- Standard fiscal year enabled, not custom fiscal year

USER PERMISSIONS

To set up Einstein Forecasting:

- Customize Application AND Modify All Data



Note: This release contains a beta version of Einstein Forecasting, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. Einstein Forecasting isn't generally available unless or until

Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Einstein Forecasting in the [IdeaExchange group in the Trailblazer Community](#).

1. If you already use Sales Cloud Einstein, add the Einstein Forecasting app permission, available later in February 2018, to your Sales Cloud Einstein permission set.
2. From Setup, enter *Einstein Forecasting* in the Quick Find box, and then select **Einstein Forecasting**.
3. Click **Enable**.
4. If you've customized your org's Home page, add the performance chart to the Home page manually.

SEE ALSO:

[Salesforce Help: Set Up Sales Cloud Einstein](#) (can be outdated or unavailable during release preview)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Einstein Lead Scoring: Clearer Predictive Factors and Detection of Rank and Department

Get a clearer view of the reasons behind each score. And see better scores with rank and department information. These changes apply to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[See the Most Relevant Reasons Behind Each Score](#)

Each lead score now more clearly shows which lead fields boost the score and which ones decrease it. Only fields that have a significant effect on the score are shown. This change applies to both Lightning Experience and Salesforce Classic.

[Get the Rank and Department of Each Lead](#)

Based on the Title field, Einstein infers the rank and department of each lead. Salesforce adds that information to your lead scoring model so that Einstein can use it when calculating scores. This change applies to both Lightning Experience and Salesforce Classic.

[Other Changes in Einstein Lead Scoring](#)

Learn about other changes we've made to Einstein Lead Scoring. These changes apply to Lightning Experience only.

EDITIONS

Available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

See the Most Relevant Reasons Behind Each Score

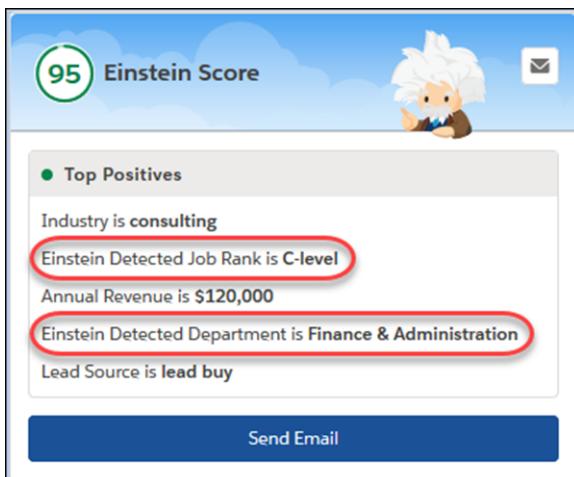
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Get the Rank and Department of Each Lead

Based on the Title field, Einstein infers the rank and department of each lead. Salesforce adds that information to your lead scoring model so that Einstein can use it when calculating scores. This change applies to both Lightning Experience and Salesforce Classic.

For example, a lead with a title of VP of Finance gets the C-level rank and the Finance & Administration department.



Other Changes in Einstein Lead Scoring

Learn about other changes we've made to Einstein Lead Scoring. These changes apply to Lightning Experience only.

Einstein Lead Scoring Reports Now Omit Leads Without a Score

For orgs that have not yet enabled Einstein Lead Scoring, the Conversion Rate by Lead Score Bucket operational and analytics reports now contain a filter that excludes leads without a score. Leads that are added between lead scoring operations don't have a score and can skew the results of the report.

If your org has already enabled Einstein Lead Scoring, you can add the filter to the operational report yourself.

1. From the Conversion Rate by Lead Score report, click Filters (▼).
2. Add a fourth filter, "Einstein Score" greater than or equal to 0".

3. Update the filter logic to (1 OR (2 AND 3)) AND 4).
4. Save the report.

To update the analytics version of the report, recreate the report using the instructions in [Update the Einstein Lead Scoring Dashboard](#).

SEE ALSO:

[Salesforce Help: Filter Report Data](#) (can be outdated or unavailable during release preview)

Einstein Activity Capture: Send Emails from Org-Wide Email Addresses and See Microsoft Events in Salesforce

We added support for org-wide emails. Plus, reps can see their Microsoft events from their Salesforce calendars. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Send Emails from Org-Wide Email Addresses](#)

When Einstein Activity Capture users send emails using an org-wide email address, such as sales@company.com, the emails are automatically logged on related Salesforce records. This change applies to Lightning Experience only.

[See Automatically Captured Microsoft® Exchange 2016 and 2013 Events from Salesforce Calendar](#)

When you set up reps for Einstein Activity Capture, they see their Microsoft events from their Salesforce calendars. Events are added to a calendar called Microsoft® Exchange, so reps can keep automatically added events separate from their Salesforce events. This change applies to Lightning Experience only.

Send Emails from Org-Wide Email Addresses

When Einstein Activity Capture users send emails using an org-wide email address, such as sales@company.com, the emails are automatically logged on related Salesforce records. This change applies to Lightning Experience only.

SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

See Automatically Captured Microsoft® Exchange 2016 and 2013 Events from Salesforce Calendar

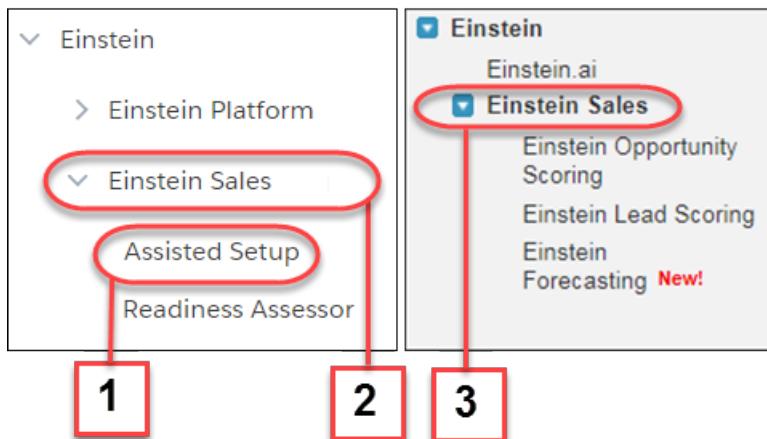
When you set up reps for Einstein Activity Capture, they see their Microsoft events from their Salesforce calendars. Events are added to a calendar called Microsoft® Exchange, so reps can keep automatically added events separate from their Salesforce events. This change applies to Lightning Experience only.

SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Sales Cloud Einstein Setup: Get Started with Sales Cloud Einstein More Easily

Setting up Sales Cloud Einstein is quicker than ever. We moved some things in Setup so that they're easier to find. Plus, we created a standard permission set to help you get reps up and running with Einstein. If you already use Sales Cloud Einstein, we updated the current permission set license. These changes apply to both Lightning Experience and Salesforce Classic.



In Lightning Experience, the Setup Assistant page is renamed Assisted Setup (1) so that it's easier to find. But it's the same great one-stop shop for setting up Sales Cloud Einstein.

In both Lightning Experience (2) and Salesforce Classic (3), find the available Sales Cloud Einstein features in Setup under Einstein Sales.

The screenshot shows the "Permission Sets" page in Salesforce.

Action	Permission Set Label	Description	License
Clone	Sales Cloud Einstein	Access to Sales Cloud Einstein	Sales Cloud Einstein

Save time with the new standard Sales Cloud Einstein permission set. You no longer have to create it yourself. Permissions for all the Sales Cloud Einstein features and dashboards are included. Assign the permission set to users, and then enable the Sales Cloud Einstein features you want them to use.

Important: If you currently use Sales Cloud Einstein, you already created a Sales Cloud Einstein permission set with the Sales Cloud Einstein permission set license. We updated the Sales Cloud Einstein permission set license to include the app permissions for the new Sales Cloud Einstein features and the Einstein dashboards. All you have to do is enable the newly added permissions and set up the new features. Users who already had access to the Einstein dashboards through the Sales Cloud Einstein Analytics permission set (renamed to Einstein Analytics for Sales Cloud) don't lose access to the Einstein dashboards. However, other Einstein users get access to the dashboards through the Sales Cloud Einstein permission set license. The updated Sales Cloud Einstein permission set is available in February 2018.

SEE ALSO:

[Einstein Readiness Assessor: Find Out Whether You're Ready for Einstein](#)

[Salesforce Help: Set Up Sales Cloud Einstein \(can be outdated or unavailable during release preview\)](#)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Sales Cloud Einstein Analytics: Expanded Access and Updated Data

All Sales Cloud Einstein users have access to the Sales Analytics app, which includes all the Sales Cloud Einstein dashboards. Plus, we updated the Einstein Automated Contacts and Einstein Lead Scoring dashboards, but you need to complete a few steps to see those updates. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Give All Sales Cloud Einstein Users Access to the Sales Analytics App](#)

All Sales Cloud Einstein users have access to the Sales Analytics app, which includes the Sales Cloud Einstein dashboards. So, you don't have to pick your five favorite coworkers anymore. We created a standard Sales Cloud Einstein permission set that includes the permissions for the Sales Analytics app. When you assign Sales Cloud Einstein to users, you give them access to the Sales Analytics app with all the great Sales Cloud Einstein dashboards. This change applies to Lightning Experience only.

[Update the Einstein Automated Contacts Dashboard](#)

We improved the Einstein Automated Contacts dashboard. To make sure that your dashboard has the most accurate data, delete the app and re-create it. This change applies to Lightning Experience only.

[Update the Einstein Lead Scoring Dashboard](#)

We improved the Einstein Lead Scoring dashboard. Upgrade it to get the most accurate data. This change applies to Lightning Experience only.

Give All Sales Cloud Einstein Users Access to the Sales Analytics App

All Sales Cloud Einstein users have access to the Sales Analytics app, which includes the Sales Cloud Einstein dashboards. So, you don't have to pick your five favorite coworkers anymore. We created a standard Sales Cloud Einstein permission set that includes the permissions for the Sales Analytics app. When you assign Sales Cloud Einstein to users, you give them access to the Sales Analytics app with all the great Sales Cloud Einstein dashboards. This change applies to Lightning Experience only.



Note: We provide dashboards for Einstein Lead Scoring, Einstein Activity Capture, and Einstein Automated Contacts.

If you already use Sales Cloud Einstein, you had five Sales Cloud Einstein Analytics licenses to assign to Einstein users. Those users don't lose access to the Einstein dashboards, but other Einstein users get access to the dashboards from [the updated Sales Cloud Einstein permission set license](#).

We also removed the Sales Cloud Einstein tab. Einstein users can still access the Einstein dashboards from the Analytics tab or the Analytics studio.

SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Update the Einstein Automated Contacts Dashboard

We improved the Einstein Automated Contacts dashboard. To make sure that your dashboard has the most accurate data, delete the app and re-create it. This change applies to Lightning Experience only.

1. Open the Einstein Automated Contacts app, and then click **Delete** from the dropdown.
2. Click **Delete Asset(s)**.
3. From Setup, enter *Einstein Automated Contacts* in the Quick Find box, and then select **Einstein Automated Contacts**.
4. Under Contacts, select **Add when user accepts suggestion**. Then select **Add automatically**.

When the re-create process is complete, the dashboard has the latest updates and the most accurate data.

SEE ALSO:

[Salesforce Help: Delete an App](#) (can be outdated or unavailable during release preview)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

USER PERMISSIONS

To delete an app:

- Use Analytics and Manager access to the app

To enable Einstein Automated Contacts:

- Customize Application AND Modify All Data

Update the Einstein Lead Scoring Dashboard

We improved the Einstein Lead Scoring dashboard. Upgrade it to get the most accurate data. This change applies to Lightning Experience only.

1. Open the Einstein Lead Scoring Analytics app. A notification appears if your app is out of date.
2. In the notification, click **What's new**. Or on the app's home page, click **New version available** in the left column.
3. At the bottom of the page, do one of the following.
 - To overwrite your current app and all its assets, click **Upgrade current app**. Upgrading your app also deletes customizations, including new fields or objects that you added to the dataflow or changes to security settings and dashboard labels and colors.
 - To copy your current app, click **Create new app**. The copy uses the new version.



Warning: If you customized your app, we recommend using **Create new app** to preserve your customizations. You can then manually copy your customizations into the new version of the app.

USER PERMISSIONS

To delete an app:

- Use Analytics and Manager access to the app

To enable Einstein Lead Scoring:

- "Customize Application" AND "Modify All Data"

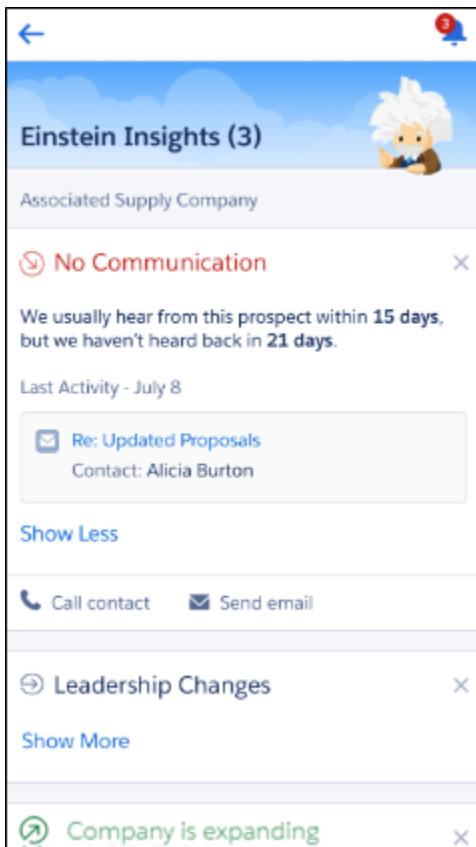
SEE ALSO:

[Salesforce Help: Upgrade the Sales Analytics App](#)

Einstein Insights: Access Account and Opportunity Insights from Your Mobile Device (Pilot)

Einstein Insights are now available when you're on the go! Stay informed with insights about your accounts. See predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place. Reps can take action directly from the insights, including editing the related record or sending emails to relevant contacts. This change applies to Salesforce for iOS and Salesforce for Android.

To access insights, tap in the left nav.



You need Sales Cloud Einstein licenses to view insights in the mobile app. Sharing actions, activity timeline details, and suggested contact insights are available in Lightning Experience only.

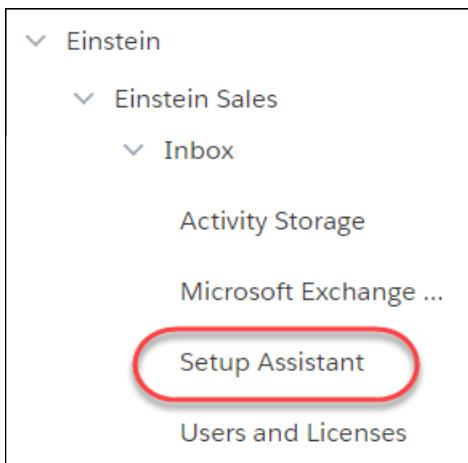
SEE ALSO:

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Inbox: Get the Productivity of Inbox with Sales Cloud Einstein

Sales Cloud Einstein now includes Inbox, which lets reps integrate their email and calendar with Salesforce with a suite of productivity features. When your reps combine the efficiency of Inbox with the intelligence of Sales Cloud Einstein, there's no stopping them. This change applies to both Lightning Experience and Salesforce Classic.

Use the Setup Assistant to get Inbox up and running in no time. From Setup, enter *Inbox* in the Quick Find box, and then select **Setup Assistant** under Inbox.



If you already use Sales Cloud Einstein, add the Einstein Inbox app permission, available later in February 2018, to your Sales Cloud Einstein permission set.

SEE ALSO:

[Prevent Read Receipts to Enhance Privacy](#)

[*Salesforce Help: Inbox* \(can be outdated or unavailable during release preview\)](#)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Core Sales Features: More Features, More Sales

Blaze your path to success even faster with new and improved features in core sales areas. Source new leads from LinkedIn. Find out how customers are engaging with your campaigns. Use Path to manage the life cycle of your accounts. Share credit for a deal with your team with Opportunity Splits in Lightning Experience. And many more features to help you close more deals. Most changes apply to Lightning Experience only, but we've tucked in a few gems for the Salesforce app and Salesforce Classic, too.

IN THIS SECTION:

[Leads: LinkedIn Integration and Conversion Configurability](#)

Integrate with LinkedIn and customize the lead conversion window.

[Campaigns: Faster Flow for Adding Members, Track Campaigns with Path, Customizable Campaign Influence Reporting, Pardot Campaign Alignment, and Engagement History](#)

Add members without leaving the campaign, track campaign stages with Path, report on opportunities influenced by your campaigns, connect your Pardot and Salesforce campaigns, and see prospect engagement.

[Path: Pick Your Own Path](#)

There's more to life than Stage and Status. Base a Path on any picklist field on standard objects so that your path can work the way your reps do. This change applies to Lightning Experience only.

[Accounts: Path, Lead–Account Matching, Better Email Support for Person Accounts, and More](#)

Manage the life cycle of your accounts with Path. Boost your account-based marketing efforts with the Matched Leads component. Send emails to person accounts with ease, and sync person accounts and Microsoft contacts. These changes apply to both Lightning Experience and Salesforce Classic.

[Opportunities: Opportunity Splits, Opportunity Product Name Visibility, Price Book Selection, and More](#)

If you've been waiting to switch to Lightning Experience because your sales reps rely on Opportunity Splits, your time has come! Opportunity Splits and three other enhancements make opportunities more useful to your business.

[Products: New Customization Option and Speedier Product Addition to Price Books](#)

Create custom actions on products, and add them to price books faster. These changes apply to Lightning Experience only.

[Enterprise Territory Management: See More Territory Information](#)

You and your reps can now filter information on opportunity reports by territory. This feature is new in both Lightning Experience and Salesforce Classic. Also new in Lightning Experience and all versions of the Salesforce app, reps see which users are assigned to an account's territories, just like in Salesforce Classic.

[Contacts: Contact Roles and Improved Contact Hierarchy Access](#)

Reps can work more quickly with an improved contact roles interface and easier access to the contact hierarchy. These changes apply to Lightning Experience only.

Leads: LinkedIn Integration and Conversion Configurability

Integrate with LinkedIn and customize the lead conversion window.

EDITIONS

IN THIS SECTION:

[Generate Leads from LinkedIn](#)

Automatically add leads to Salesforce from LinkedIn Lead Gen advertisements. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new Salesforce leads. This feature is new in both Lightning Experience and Salesforce Classic.

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Streamline Lead Conversion Without Opportunities](#)

Speed up the conversion process for sales teams that don't create opportunities when they convert leads. Choose new default lead conversion settings for opportunities, or hide the opportunity section of the conversion window altogether. This change applies to Lightning Experience only.

Generate Leads from LinkedIn

Automatically add leads to Salesforce from LinkedIn Lead Gen advertisements. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new Salesforce leads. This feature is new in both Lightning Experience and Salesforce Classic.

Assign the new leads to the user or queue you choose. You can add up to 500 leads from LinkedIn per day. If the number of leads you get in a day exceeds the limit, we email the additional leads to the default lead creator you designate in Setup.

Setting up the connection is simple.

1. Connect a LinkedIn account (1) to your Salesforce org. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **LinkedIn Accounts**. Log in to LinkedIn with the member account you plan to use for managing lead generation. The member account can be either a Campaign Manager or Account Manager with the Lead Gen Form Manager permission or a Company Page Admin.

Salesforce connects the ad accounts associated with this member account to your org (2). All forms associated with these ad accounts generate leads in Salesforce. If a rep adds an ad account, be sure that they inform you. To connect the new ad account to Salesforce, click **Refresh Accounts**.

The screenshot shows the 'LinkedIn Accounts' setup page. At the top, there's a 'Manage LinkedIn Fields' button. Below it, the 'Connected LinkedIn Member Account' section is highlighted with a red box and a red number '1'. It lists one account: 'Srijita Mori' with 'Authorized' status. The 'Connected LinkedIn Ad Accounts' section is also highlighted with a red box and a red number '2'. It lists one account: 'KP Enterprises Inc_1' with 'Authorized' status. There's a 'Refresh Accounts' button at the bottom right.

Tip: We recommend using a LinkedIn account that is associated with your company and that multiple employees can access and manage. Be sure to associate this member account with all your LinkedIn ad accounts.

- Set up default values for leads from LinkedIn. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **Lead Gen Fields**.

The screenshot shows the 'LinkedIn Lead Gen Fields' setup page. At the top, there's a 'View Accounts' button. The 'Set Lead Defaults' section is highlighted with a red box. It contains fields for 'Default Lead Creator' (set to 'Srijita Mori'), 'Record Type' ('Lead Record Type 1'), and 'Lead Source' ('Advertisement'). Below these are three expandable sections: 'Map Form Data', 'Map Lead Fields', and 'Map LinkedIn Questions to Custom Fields'. A 'Save' button is located at the bottom right.

- Map LinkedIn form metadata fields to lead fields. This metadata provides information about the form that the lead comes from. Usually, you use custom lead fields for this data. Consider using a specific Lead Source value for leads from LinkedIn. Your marketing team can use the form metadata when analyzing campaign effectiveness.

The screenshot shows the 'LinkedIn Lead Gen Fields' setup page. At the top, there's a 'SETUP' icon, the title 'LinkedIn Lead Gen Fields', and a 'View Accounts' button. Below the title, there are three main sections: 'Set Lead Defaults', 'Map Form Data', and 'Map Lead Fields'. The 'Map Form Data' section is highlighted with a red oval. It contains a sub-instruction: 'Know where your LinkedIn data is coming from. Understand which form, ad account, and campaign your leads are using. Map the data to standard or custom lead fields.' Below this, there are two columns: 'LINKEDIN DATA' (AdForm Response ID, Advertiser Account, Campaign, Creative, Form, Lead Type, Submitted At) and 'LEAD FIELDS' (Search Fields for each). At the bottom of the 'Map Form Data' section, there are links for 'Map Lead Fields' and 'Map LinkedIn Questions to Custom Fields', along with a 'Save' button.

- Map LinkedIn lead fields to Salesforce lead fields. Mapped fields must share the same data type.

The screenshot shows the 'LinkedIn Lead Gen Fields' setup page. The 'Map Lead Fields' section is highlighted with a red oval. It contains a sub-instruction: 'Map the fields collected from LinkedIn Lead Gen forms to Salesforce lead fields.' Below this, there are two columns: 'LINKEDIN FIELDS' (First Name, Last Name, Company Name, Phone Number) and 'SALESFORCE FIELDS' (First Name, Last Name, Company, Phone). Each LinkedIn field is mapped to a corresponding Salesforce field.

- Set up more Salesforce lead fields to capture data from your LinkedIn custom form questions. Use a lead field for each question and another for the answer provided by the lead. This way you can report on questions and answers by filtering leads by questions asked.

The screenshot shows the 'LinkedIn Lead Gen Fields' setup page. At the top, there are navigation links: 'SETUP' (with a gear icon), 'LinkedIn Lead Gen Fields' (the current page), and 'View Accounts'. Below the header, there's a sidebar with three items: 'Set Lead Defaults', 'Map Form Data', and 'Map Lead Fields'. The fourth item, 'Map LinkedIn Questions to Custom Fields', is preceded by a checkmark and has a red box drawn around it. A descriptive text follows: 'Each LinkedIn form can have up to three optional questions. Use these questions for campaign-specific information you want your leads to provide. Store questions and answers in Salesforce by mapping them to custom lead fields.' A 'Learn More' link is provided. The main content area is a table titled 'LINKEDIN QUESTIONS' and 'SALESFORCE LEAD FIELDS'. It lists three rows for 'Custom Question 1', 'Custom Question 2', and 'Custom Question 3'. Each row contains two columns: 'Question' (with 'Search Fields' buttons) and 'Answer' (with 'Search Fields' buttons).

LINKEDIN QUESTIONS	SALESFORCE LEAD FIELDS
Custom Question 1	Question <input type="button" value="Search Fields"/> Answer <input type="button" value="Search Fields"/>
Custom Question 2	Question <input type="button" value="Search Fields"/> Answer <input type="button" value="Search Fields"/>
Custom Question 3	Question <input type="button" value="Search Fields"/> Answer <input type="button" value="Search Fields"/>

- To confirm your choices and begin receiving leads, click **Save**.

No leads come to Salesforce until you save your field mappings.

Streamline Lead Conversion Without Opportunities

Speed up the conversion process for sales teams that don't create opportunities when they convert leads. Choose new default lead conversion settings for opportunities, or hide the opportunity section of the conversion window altogether. This change applies to Lightning Experience only.

In Setup, enter *Lead Settings* in the Quick Find box, then select **Lead Settings**.

You have two new options to customize the Convert Lead window for your business.

Edit Lead Settings

Use the lead settings below to specify default lead behavior for your organization. If your organization uses record types, the assignment rules determine the record type when a lead is created manually or imported without a specified record type. When no assignment rules apply, the record type of the lead owner is used. When the default lead owner is a queue, the queue owner's default record type is used.

Lead Queue Settings

The queue or user that will own a lead when assignment rules fail to locate an owner:

- when a lead is saved with the auto-assign checkbox selected
- when a lead is captured online

User Notify Default Lead Owner

Lead Conversion Settings

Require Validation for Converted Leads

Preserve Lead Status

Enable Conversions for Salesforce Mobile

Hide Opportunity Section of Convert Lead Window 1

Select "Don't create an opportunity" by Default in Convert Lead Window 2

Save **Cancel**

- Decide whether to hide the Opportunity section of the Convert Lead window (1).
- Decide whether the Don't create opportunity option is selected by default (2).

Campaigns: Faster Flow for Adding Members, Track Campaigns with Path, Customizable Campaign Influence Reporting, Pardot Campaign Alignment, and Engagement History

Add members without leaving the campaign, track campaign stages with Path, report on opportunities influenced by your campaigns, connect your Pardot and Salesforce campaigns, and see prospect engagement.

IN THIS SECTION:

[Add Campaign Members Faster](#)

Your marketing team can now quickly select, search for, and add leads, contacts, and person accounts to campaigns without leaving the campaign detail page. Previously, when users added leads, contacts, or person accounts, they were sent to the Leads or Contacts home pages, taking them away from the campaign details. This change applies to Lightning Experience only.

[Use Path to Track Campaign Progress](#)

Campaigns have a life cycle. Whether they've just sent the first email or They're reeling in those last few leads, Path helps your marketing team manage the stages of your campaigns. Use a path to coach your marketers how to move a campaign to the next stage. This change applies to Lightning Experience only.

[Report on Customizable Campaign Influence](#)

With the new Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report type, your marketing team can quickly see the number of opportunities and amount of revenue each campaign has influenced. Marketers can stay on top of which campaigns are performing well and make adjustments as needed. This change applies to both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Connect Your Pardot Campaigns to Salesforce Campaigns \(Beta\)](#)

Let your marketing department use the features of both Pardot and Salesforce with a single set of campaign records. When campaigns are connected, marketers can track campaign influence and view engagement history all on the same record in Salesforce. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[See Marketing Asset Performance Directly on Campaigns \(Beta\)](#)

When they connect their Pardot and Salesforce campaigns, your marketing department can see exactly how much engagement their campaigns are generating, right in Salesforce. Add the Engagement Metrics component, engagement history fields, and report charts to campaign page layouts to show marketers how much activity their emails and forms are generating. Add the Engagement History related list to leads and contacts to see how they have engaged. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Add Campaign Members Faster

Your marketing team can now quickly select, search for, and add leads, contacts, and person accounts to campaigns without leaving the campaign detail page. Previously, when users added leads, contacts, or person accounts, they were sent to the Leads or Contacts home pages, taking them away from the campaign details. This change applies to Lightning Experience only.

The screenshot shows a modal window titled "Add Leads to Campaign". At the top, there's a search bar labeled "Search Leads..." with two items listed: "Smith Jack" and "Frankie Fenwick". Below the search bar, a table displays five leads with columns for Name, Priority, Title, Phone, Company, Email, Lead Status, and Owner Alias. The leads are: Kim Clausen (Purchasing), Kelsey Bedard (Operations Manager), Pearl Wilson (Purchasing), Edwin Louten (EVP Business Development), and Darwin Ashford (EVP Business Development). Each lead has a small blue plus icon to its left. At the bottom of the window, there are "Cancel" and "Next" buttons.

From the Campaign Members related list, click **Add Leads** or **Add Contacts**. A window displays the Recently Used list view. Click **Add Contacts** to add person accounts.

Use Path to Track Campaign Progress

Campaigns have a life cycle. Whether they've just sent the first email or They're reeling in those last few leads, Path helps your marketing team manage the stages of your campaigns. Use a path to coach your marketers how to move a campaign to the next stage. This change applies to Lightning Experience only.

The screenshot shows a campaign record for "2018 Webinars". The top section includes fields for Type (Seminar / Conference), Status (Planned), Start Date (1/8/2018), and End Date (4/23/2018). To the right are buttons for Edit, Delete, Clone, and a dropdown menu. Below this, a status path is displayed with four steps: "Planned" (highlighted with a red border), "In Progress", "Completed", and "Aborted". A button labeled "Mark Status as Complete" with a checkmark icon is located at the end of the path.

For example, maybe your marketing team uses long-term campaigns that take a while to develop. Or, perhaps you have a short marketing cycle with lots of campaigns. Path can help marketers quickly see and update the status of each campaign right at the top of the record.

With all paths, the steps are based on the values in the picklist field that you select when you set up the path. For campaigns, choose the Status field or another field you use to track campaign progress. If you use separate record types for campaigns, you can create a different path for each.

Because many business processes can apply to campaigns, we don't provide a default path. Instead, use any available campaign picklist fields to create the path that makes sense for your sales team. Create a path for campaigns using the same steps used for other objects.

From Setup, enter *Path* in the Quick Find box, and then select **Path Settings**. Use the Lightning App Builder to add the Path component to your campaign page layouts. To reorder the picklist values, use the Object Manager to edit the field that your path uses.

SEE ALSO:

[Salesforce Help: Guide Users with Path](#)

Report on Customizable Campaign Influence

With the new Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report type, your marketing team can quickly see the number of opportunities and amount of revenue each campaign has influenced. Marketers can stay on top of which campaigns are performing well and make adjustments as needed. This change applies to both Lightning Experience and Salesforce Classic.

Marketers can choose the new standard report type (1). The Report Builder creates reports showing each campaign (2) with its opportunities (3) and their value (4).

The Opportunity Contact Role object and cross filtering are not available in this report.

Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)

Let your marketing department use the features of both Pardot and Salesforce with a single set of campaign records. When campaigns are connected, marketers can track campaign influence and view engagement history all on the same record in Salesforce. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the "Services" under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer's use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.

To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only, doesn't affect your Salesforce license usage, and doesn't access or update any data by default. If you choose to opt-in to the optional new Pardot features available in Sales Cloud, then this user enables engagement history and other campaign data to flow between your Pardot org

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot Standard, Pardot Pro, or Pardot Ultimate Edition

and your Salesforce org. This can include copying records from Pardot to Salesforce and vice-versa.

This feature is included in the Spring '18 release, but is not available until April 2, 2018. Ask your Salesforce account executive to enable this feature if it is not provisioned for your org by that date.

When you enable Connected Campaigns in Pardot, your marketing department can begin connecting their Pardot campaign records to their Salesforce campaign records. Marketing users can then work with their Pardot data right in Salesforce. Then, whether users work with Salesforce or Pardot features, they use the Salesforce campaign record.

Considerations

Before you enable Connected Campaigns and let users connect their campaigns, keep these considerations in mind.

- To work with connected campaigns, Pardot users need a Salesforce login.
- When you enable Connected Campaigns, only campaigns you connect can be used in Pardot. When you connect a campaign, the Pardot campaign record becomes read-only. Campaigns can't be created from Pardot. Create campaigns from the Salesforce Campaigns tab.
- Marketers can choose which Salesforce campaign record types to connect to Pardot campaigns. Depending on how your company uses record types, your marketing department can choose not to connect some record types.
- Connecting campaigns lets Pardot users access Customizable Campaign Influence to track the opportunities generated by their campaigns.
- For connected campaigns, Pardot engagement history data becomes available in Salesforce. Add engagement history fields to the page layouts for connected campaign record types.
- Salesforce copies associated marketing forms, marketing links, and list emails from Pardot campaigns to their connected Salesforce campaigns. This data counts against your company's data storage limits.
- You can connect multiple Pardot orgs to a single Salesforce org, as long as you enable different campaign record types for Connected Campaigns in each Pardot org.
- When a Salesforce campaign connects to a Pardot campaign, it replaces the values of some Pardot campaign fields.
 - Name
 - Archive Date
 - Cost
 - Created By
 - Updated By
 - Updated At



Note: This action can't be undone.

Enable Connected Campaigns

To enable Connected Campaigns,

1. From Pardot, go to Settings.
2. Click **Edit**.
3. Scroll down and click **Connect Campaigns**.
4. Select the Salesforce campaign record types you want to let marketers connect to Salesforce campaigns. The master record type is the default record type included with Salesforce.
5. Click **Save Account**.

6. Click **Enable Connected Campaigns**.

7. Click **Save Account** again.

When you enable Connected Campaigns, Pardot campaign records can only be used to manage campaign membership. Users perform all other campaign tasks on the connected Salesforce campaign records.

When your marketing team finishes connecting their campaigns, return to the Settings page to complete the alignment process.

1. Click **Use Salesforce to manage all campaigns**. This setting removes the Connect to CRM Campaign action from the Pardot Campaigns page.

2. To let Pardot users see any unconnected campaigns, click **Show Unconnected Campaigns**. This setting only applies when you enable **Use Salesforce to manage all campaigns**.

Connect Pardot and Salesforce Campaigns

When marketers are ready to connect their campaigns, they can do so one at a time, or in bulk.

NAME	VISITORS	PROSPECTS	UPDATED	ACTIONS
Webinar Campaign	1	0	Oct 26, 2017 4:59 PM	<input type="button" value="Connect to CRM Campaign"/> <input type="button" value="Delete"/>
Email Campaign	0	0	Oct 13	
Web Form Campaign	0	4	Oct 13	
Billboard Campaign	0	0	Oct 11, 2017 5:42 PM	

To connect an individual campaign, from the Campaigns page in Pardot, choose the **Unconnected Campaigns** view (1). Click the **Connect to CRM Campaign** action (2) for the campaign you want to connect and then select a Salesforce campaign to connect.

To connect campaigns in bulk, click **Download Mapping Workbook** (3). Salesforce exports an Excel spreadsheet with separate tabs listing your Pardot and Salesforce campaigns. Use the Connect Campaigns tab in the spreadsheet to create a connection list. When you are finished, click **Upload Completed Workbook** (4) and upload your completed spreadsheet.

To connect a new Salesforce campaign to a new Pardot campaign, marketers can simply create a Salesforce campaign. Salesforce creates and connects a Pardot campaign automatically.

SEE ALSO:

[See Marketing Asset Performance Directly on Campaigns \(Beta\)](#)

See Marketing Asset Performance Directly on Campaigns (Beta)

When they connect their Pardot and Salesforce campaigns, your marketing department can see exactly how much engagement their campaigns are generating, right in Salesforce. Add the Engagement Metrics component, engagement history fields, and report charts to campaign page layouts to show marketers how much activity their emails and forms are generating. Add the Engagement History related list to leads and contacts to see how they have engaged. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the "Services" under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer's use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.

To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only, doesn't affect your Salesforce license usage, and doesn't access or update any data by default. If you choose to opt-in to the optional new Pardot features available in Sales Cloud, then this user enables engagement history and other campaign data to flow between your Pardot org and your Salesforce org. This can include copying records from Pardot to Salesforce and vice-versa.

This feature is included in the Spring '18 release, but is not available until April 2, 2018. Ask your Salesforce account executive to enable this feature if it is not provisioned for your org by that date.

On Salesforce campaigns that are connected to Pardot campaigns, engagement history data flows from Pardot to the Salesforce campaign record and related marketing assets. Engagement history includes every new activity on marketing assets associated with connected campaigns by known prospects that are syncing with Salesforce. Known prospects are Pardot prospects that have provided at least their email address. These marketing assets are supported:

- List emails, including emails sent from Pardot
- Marketing forms, including both forms and form handlers in Pardot
- Marketing links, including custom redirects in Pardot

In Salesforce, new ListEmail, MarketingForm, and MarketingLink objects store records for these assets, which are copied from the corresponding Pardot records. These records count against your org's data storage limits. These objects are accessible only in reports.

To get Pardot engagement data into your Salesforce campaigns, there are some requirements.

- The Pardot campaign must be connected to a Salesforce campaign. For more information, see [Connect Your Pardot Campaigns to Salesforce Campaigns \(Beta\)](#).
- The prospect engaging with a marketing asset must provide enough information to identify them, such as their email address.
- The prospect must be syncing with a Salesforce lead or contact. Syncing happens when the Pardot and Salesforce campaigns are connected, the Pardot prospect is identified, and the matching Salesforce lead or contact is a member of the connected Salesforce campaign.
- The prospect must be assigned to a user, group, or queue in Salesforce. A good way to assign prospects is with an automation rule. For more information, see [Assigning Prospects](#) in Salesforce Help.

Editions

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot Standard, Pardot Pro, or Pardot Ultimate Edition

- To access engagement history data, users need the Sales User or CRM User standard permission set and field-level security access to the engagement history fields.

Several fields become available to Salesforce campaigns and can be added to your page layouts for campaigns. Field-level security for each is initially set to not visible. Only include engagement fields on campaign record types enabled for Connected Campaigns. Each field updates daily.

- **List emails, including emails sent from Pardot:**

- Unique Email Opens in Campaign
- Unique Email Opens in Hierarchy
- Unique Email Clicks in Campaign
- Unique Email Clicks in Hierarchy
- Total Emails Delivered in Campaign
- Total Emails Delivered in Hierarchy

- **Forms and form handlers:**

- Total Form Submissions in Campaign
- Total Form Submissions in Hierarchy
- Total Form Views in Campaign
- Total Form Views in Hierarchy

- **Custom redirects and marketing links:**

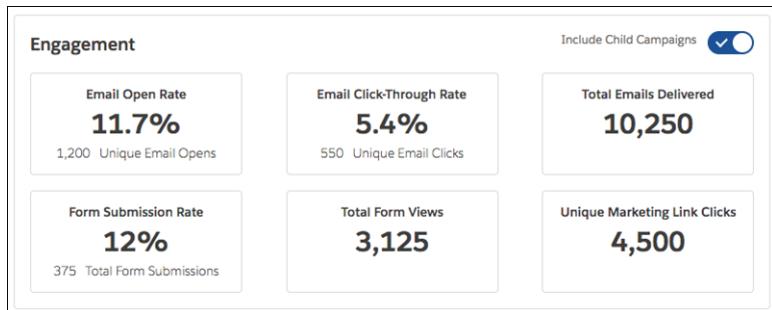
- Unique Marketing Link Clicks in Campaign
- Unique Marketing Link Clicks in Hierarchy

Depending on the data users want to see, you can add the engagement history fields to campaign page layouts individually.

Field	Value
Marketing Form Views in Campaign	242
Marketing Form Submissions in Campaign	167

In Lightning Experience, you can add the Engagement Metrics component to campaigns to see them all together. The component displays three more fields.

- Email Open Rate
- Email Click-Through Rate
- Form Submission Rate



When you add the Engagement Metrics component, marketers can view statistics for just the campaign or for the campaign hierarchy. Add engagement fields to campaign list views to let users easily find campaigns with engagement.

Campaigns					
All B2B Marketing Campaigns ▾					
	CAMPAIGN NAME	TOTAL FORM SUBMISSIONS	TOTAL FORM VIEWS IN CAMPAIGN	TOTAL FORM SUBMISSIONS	TOTAL FORM VIEWS IN HISTORY
1	AdWords: Expense Management	0	0	0	0
2	Best Practices Webinar	0	0	0	0
3	Blogs	0	0	0	0
4	Cold Leads Re-engagement Nurture	0	0	0	0
5	Competitive Deal Nurture	0	0	0	0
6	Corporate Website	1,099	10,274	1,099	10,274
7	Dreamforce	43	432	43	432
8	Dreamforce 2017 Campaign	0	0	0	0
9	Dreamforce Campaign	0	0	0	0
10	Education Nurture	0	0	0	0
11	Email Plug-in	0	0	0	0
12	Facebook (Pardot)	0	0	0	0
13	Facebook Webinar Follow-Up Nurture	0	0	0	0
14	LinkedIn	0	0	0	0
15	My Dreamforce Campaign	0	0	0	0
16	Newly Created	0	0	0	0

Marketers can use native Salesforce reporting to build reports that include campaigns, Pardot marketing assets, and the engagement totals on those assets. Using Lightning App Builder, you can include report charts on Lightning Experience campaign page layouts to let users view the engagement data that's important to them.



To let users see individual lead and contact engagement in Lightning Experience, add the Engagement History related list to lead and contact detail pages. The Engagement History related list updates when the activity occurs, so users get a real-time view of engagement.

The screenshot shows a Contact record for 'Corina Mauro'. At the top, there are fields for Title ('EVP Business Development'), Account Name ('Displaytech'), Phone ('(709) 555-2582'), and Email ('cmauro@example.com'). Below these, there are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is selected, showing a section titled 'Engagement History (6+)' with a table. The table has columns for 'MARKETING ASSET', 'ACTIVITY TYPE', and 'ACTIVITY DATE'. The data in the table is as follows:

MARKETING ASSET	ACTIVITY TYPE	ACTIVITY DATE
Demo Request	Form Submit Success	9/12/2017 5:30 PM
Demo Request	Form View	9/12/2017 5:30 PM
Webinar Registration	Form Submit Success	9/12/2017 5:30 PM
Webinar Registration	Form View	9/12/2017 5:30 PM
Event Registration	Form Submit Success	9/12/2017 5:29 PM
Event Registration	Form View	9/12/2017 5:29 PM

At the bottom of the list, there is a blue link labeled 'View All'.

The Engagement History related list is separate from the Engagement History component available in the Pardot managed package on the AppExchange. The related list displays native Salesforce engagement data for marketing forms, list emails, and marketing links. The available component displays engagement data queried from Pardot for all marketing asset types.

SEE ALSO:

- [Pardot Pricing](#)
- [Connect Your Pardot Campaigns to Salesforce Campaigns \(Beta\)](#)

Path: Pick Your Own Path

There's more to life than Stage and Status. Base a Path on any picklist field on standard objects so that your path can work the way your reps do. This change applies to Lightning Experience only.

SEE ALSO:

- [Use Path to Build Relationships with Accounts](#)
- [Use Path to Track Campaign Progress](#)
- [Case Path for Lightning Experience](#)

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Accounts: Path, Lead–Account Matching, Better Email Support for Person Accounts, and More

Manage the life cycle of your accounts with Path. Boost your account-based marketing efforts with the Matched Leads component. Send emails to person accounts with ease, and sync person accounts and Microsoft contacts. These changes apply to both Lightning Experience and Salesforce Classic.

Use Path to Build Relationships with Accounts

Accounts have stages, too. Whether you're nurturing relationships with customers or trying to turn prospects into customers without using an opportunity, Path helps manage the life cycle of your accounts.

Access an Account's Hierarchy More Easily

The game of hide and seek is over and your users are the winners. Click the **View Account Hierarchy** icon in any account's header to go right to its hierarchy.

Connect the Dots Between Leads and Accounts

If you use Pardot, help your teams practice account-based marketing by using your Salesforce data in a new way. In Lightning App Builder, add the Matched Leads component to your business account pages to show leads matched to an account, with the best matches first. Sales teams can convert leads without leaving the account. By reducing redundant data, the Matched Leads component helps you work toward complying with data protection and privacy regulations.

Email Person Accounts Faster

Reps can now easily send an email to a person account. If a person account record has an email address, the Send Email action fills in the To field with that name and email address.

Sync Person Accounts with Microsoft® Contacts

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between their Salesforce and Microsoft contacts. That way, reps no longer have to maintain contact records in both systems.

Sync Person Accounts with Google Contacts

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between Salesforce and Google Contacts. That way, reps no longer have to maintain contact records in both systems.

Fine Tune Account Searches with Filters

You can now filter search results for accounts. Make your initial search as broad as you want, then apply filters to focus the results.

View a Person Account's Assets in Lightning Experience

In Lightning Experience, the Assets related list on person accounts now displays all assets related to the person account. Previously, if the Contact field on an asset listed a person account, the asset didn't appear in the Assets related list on the person account in Lightning Experience.

Leverage Person Accounts for Financial Services Cloud

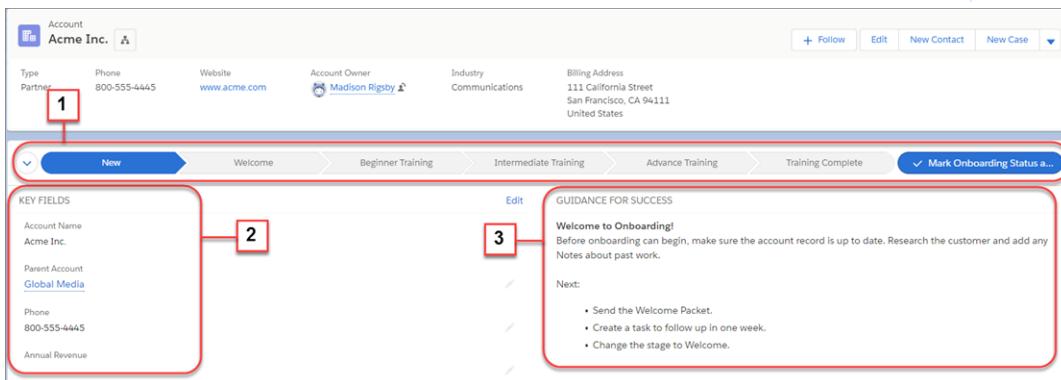
If you're new to Financial Services Cloud, good news! You can now use either person accounts or the individual object model.

Use Path to Build Relationships with Accounts

Accounts have stages, too. Whether you're nurturing relationships with customers or trying to turn prospects into customers without using an opportunity, Path helps manage the life cycle of your accounts. This change applies to Lightning Experience only.

Editions

Available in: **Group, Professional, Enterprise, Performance, and Unlimited** Editions



Set up a path for business or person account record types. As with all paths, the steps (1) are based on the values in the picklist field that you select when you set up the path. The picklist fields that are available depend on whether the path is for business or person account

record types. Focus your reps on the most critical information by highlighting it in Key Fields (2). Include guidance to help reps succeed at each step on the path (3).

Because many business processes can apply to accounts, we don't provide a default path. Instead, use any of the available business or person account picklist fields to create the path that makes sense for your sales team. For example, maybe your reps must build relationships with their banking customers over several years. Use a path to coach your reps on developing these long-term relationships. Or perhaps you have a short sales process that doesn't require an opportunity. Path can help reps work through the sales process right in the account record.

The --Master-- account record type applies only to business accounts.

Create a path for accounts using the same steps used for other objects. From Setup, enter *Path* in the Quick Find box, and then select **Path Settings**. Use the Lightning App Builder to add the Path component to your account page layouts.

SEE ALSO:

[Salesforce Help: Guide Users with Path](#) (can be outdated or unavailable during release preview)

[Path: Pick Your Own Path](#)

Access an Account's Hierarchy More Easily

The game of hide and seek is over and your users are the winners. Click the **View Account Hierarchy** icon in any account's header to go right to its hierarchy. These changes apply to Lightning Experience only.

Connect the Dots Between Leads and Accounts

If you use Pardot, help your teams practice account-based marketing by using your Salesforce data in a new way. In Lightning App Builder, add the Matched Leads component to your business account pages to show leads matched to an account, with the best matches first. Sales teams can convert leads without leaving the account. By reducing redundant data, the Matched Leads component helps you work toward complying with data protection and privacy regulations. This feature is new in Lightning Experience.

The screenshot shows the Account page for 'Acme'. At the top, there are tabs for 'Account', 'Acme', 'Details', and 'News'. Below the tabs, there are sections for 'Type: Prospect', 'Phone: (212) 555-5555', 'Website', 'Account Owner: Admin User', 'Industry: Manufacturing', and 'Billing Address: 123 Mission Street, San Francisco, CA 94105, United States'. Under the 'RELATED' tab, there are sections for 'Contacts (3)', 'Opportunities (3)', and 'Tasks (0)'. The 'Contacts (3)' section lists Howard Jones (Buyer, info@salesforce.com), Edward Stamos (President and CEO, info@salesforce.com), and Leanne Tomlin (VP Customer Support, info@salesforce.com). The 'Matched Leads' component is located on the right side of the page, showing a list of leads: Sarah Loehr (System Administrator, lead@acme.com, (555) 555-1212, New), and John Gardner (Exec VP, lead@acme.com, (555) 555-1212, New). A red circle highlights the 'Convert' button next to Sarah Loehr's entry.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with **Pardot Pro** or **Pardot Ultimate** Edition

The Matched Leads component is populated by a new standard matching rule for leads on accounts.

SEE ALSO:

[Salesforce Help: Standard Matching Rule for Leads on Accounts](#) (can be outdated or unavailable during release preview)

[Pardot Pricing](#)

Opportunities: Opportunity Splits, Opportunity Product Name Visibility, Price Book Selection, and More

If you've been waiting to switch to Lightning Experience because your sales reps rely on Opportunity Splits, your time has come! Opportunity Splits and three other enhancements make opportunities more useful to your business.

IN THIS SECTION:

[Share Credit for a Deal in Lightning Experience](#)

Opportunity splits make it easy for sales reps to collaborate on opportunities and share opportunity with team members. This feature is new in Lightning Experience.

[See a Product's Entire Name](#)

A few missing letters or numbers in a name can make a difference when selecting products from a list. You know how crucial it is to view every last letter in a product's full name before you add it to your opportunity. The Add Products interface now gives you more options for viewing long blocks of text, like product names and descriptions. This change applies to Lightning Experience only.

[Find the Right Price Book the First Time](#)

No need for sales reps to scroll through dozens of price books just to find the one they always use. Now the last price book the rep used is the first option when the rep adds a price book to an opportunity. This change applies to Lightning Experience only.

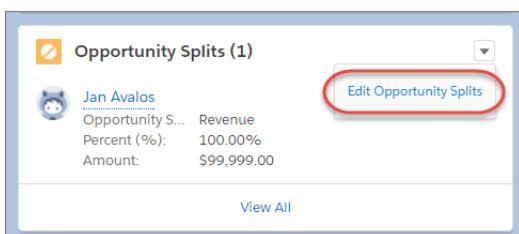
[Add Account Team Members to Opportunity Teams](#)

Streamline opportunity team creation by adding account team members to the opportunity team in one click. This change applies to Lightning Experience and all versions of the Salesforce app.

Share Credit for a Deal in Lightning Experience

Opportunity splits make it easy for sales reps to collaborate on opportunities and share opportunity with team members. This feature is new in Lightning Experience.

Team members working an opportunity can see how much credit they get for each deal. Roll individual sales credits into quota and pipeline reports for the entire team.



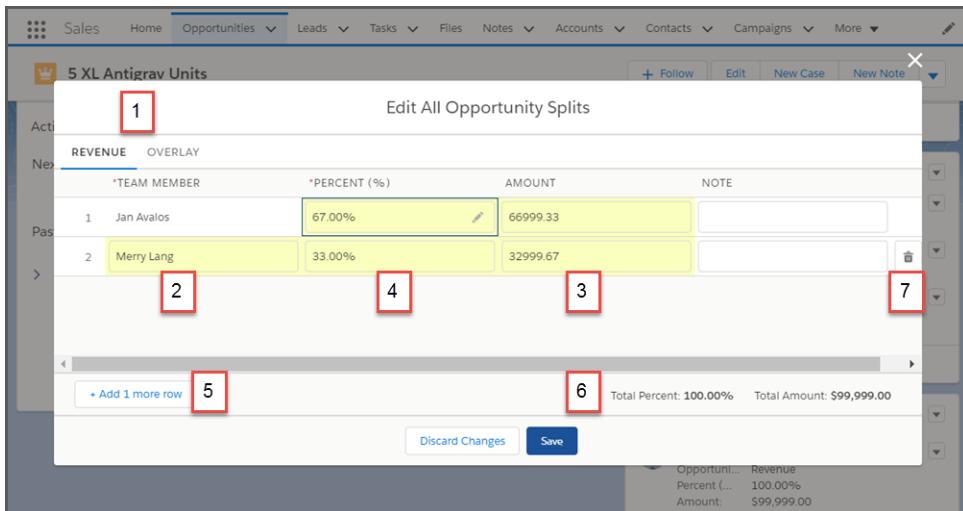
Add or adjust splits from the Opportunity Splits related list. The opportunity's owner gets 100% until other splits are added. The opportunity's owner or users above the owner in your hierarchy can add and adjust splits.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

EDITIONS

Available in: **Performance and Developer** Editions, and in **Enterprise and Unlimited** Editions with the Sales Cloud



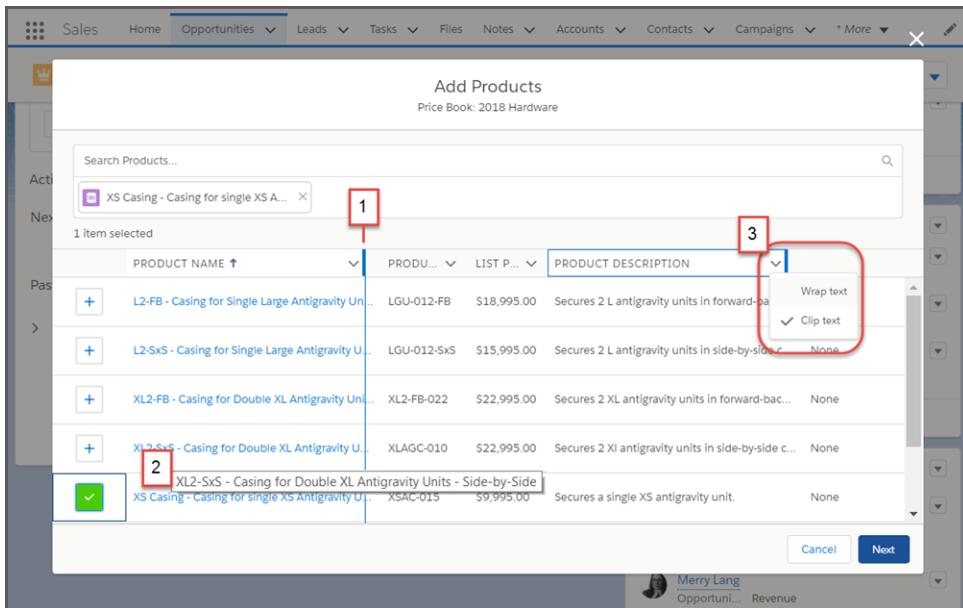
- Select revenue or overlay splits (1).
- Add a team member to share credit with (2).
- The amount (3) is calculated based on the percent entered (4) for the team member.
- You can add more rows (5) to split with more team members.
- For splits that must total 100%, totals (6) appear in red if the percents entered add up to more or less than 100%.
- You can delete any split (7) except the opportunity owner's share.

See a Product's Entire Name

A few missing letters or numbers in a name can make a difference when selecting products from a list. You know how crucial it is to view every last letter in a product's full name before you add it to your opportunity. The Add Products interface now gives you more options for viewing long blocks of text, like product names and descriptions. This change applies to Lightning Experience only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions



Drag columns to widen them (1), hover over a product's name to view the entire name (2), and set columns to wrap text or clip it (3).

Find the Right Price Book the First Time

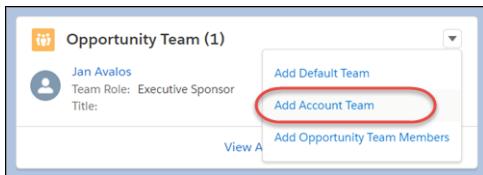
No need for sales reps to scroll through dozens of price books just to find the one they always use. Now the last price book the rep used is the first option when the rep adds a price book to an opportunity. This change applies to Lightning Experience only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Add Account Team Members to Opportunity Teams

Streamline opportunity team creation by adding account team members to the opportunity team in one click. This change applies to Lightning Experience and all versions of the Salesforce app.



EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Products: New Customization Option and Speedier Product Addition to Price Books

Create custom actions on products, and add them to price books faster. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Create More Bells and Whistles on Products](#)

Previously, you could create custom buttons or links on products. Now custom actions are also available. This feature is new in Lightning Experience.

EDITIONS

Available in Lightning Experience in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Add Products to Price Books Faster

Reps can save time by adding up to 50 products to a price book in one go. This change applies to Lightning Experience only.

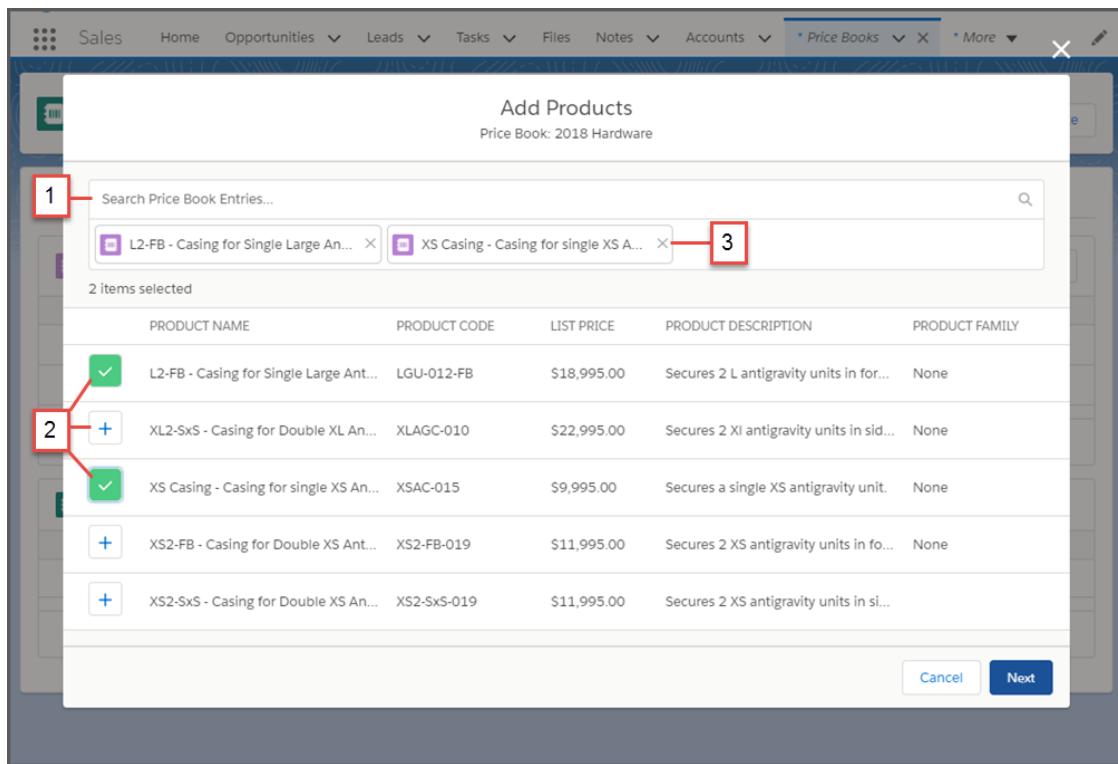
Create More Bells and Whistles on Products

Previously, you could create custom buttons or links on products. Now custom actions are also available. This feature is new in Lightning Experience.

Creating custom actions makes Salesforce work more like your users do, such as by letting your users automatically create or associate records at the click of a button.

Add Products to Price Books Faster

Reps can save time by adding up to 50 products to a price book in one go. This change applies to Lightning Experience only.



No need to scroll forever—just search for products by name (1). Select one or more products (2) to add to the price book. Review and remove selected products (3) before continuing to the next page.

Enterprise Territory Management: See More Territory Information

You and your reps can now filter information on opportunity reports by territory. This feature is new in both Lightning Experience and Salesforce Classic. Also new in Lightning Experience and all versions of the Salesforce app, reps see which users are assigned to an account's territories, just like in Salesforce Classic.

EDITIONS

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Express Logistics and Transport

RELATED **DETAILS** **NEWS**

We found no potential duplicates of this account.

Assigned Territories (1)

TERRITORY	TERRITORY MODEL	MODEL STATE	ASSIGNMENT DATE	METHOD
Northern California	Current Fiscal Year	Planning	11/21/2017 11:17 AM	Territory Manual

[View All](#)

Users in Assigned Territories (1)

FULL NAME	EMAIL	ROLE IN TERRITORY	TERRITORY NAME	TERRITORY MODEL
Lance Park	fdsa@salesforce.com		Northern California	Current Fiscal Year

If you've already added the Users in Assigned Territories related list to your account page layout, you're good to go!

Filters **Add ▾**

Show **All opportunities** **Territories**

Date Field

To add filter

- My opportunities
- My team-selling opportunities
- My team-selling and my opportunities
- My team's opportunities
- My team's team-selling and their opportunities
- All opportunities
- My territories' opportunities**

When creating, editing, or running an opportunity report, select **My territories' opportunities** in the Show field to include the opportunities that belong to your territories.

SEE ALSO:

[See More on the Go with Enterprise Territory Management](#)

[Trailhead: Increase Sales Efficiency with Territory Management](#)

Contacts: Contact Roles and Improved Contact Hierarchy Access

Reps can work more quickly with an improved contact roles interface and easier access to the contact hierarchy. These changes apply to Lightning Experience only.

EDITIONS

Available in: **All** Editions

IN THIS SECTION:

[Update Contact Roles Like a Speed Demon](#)

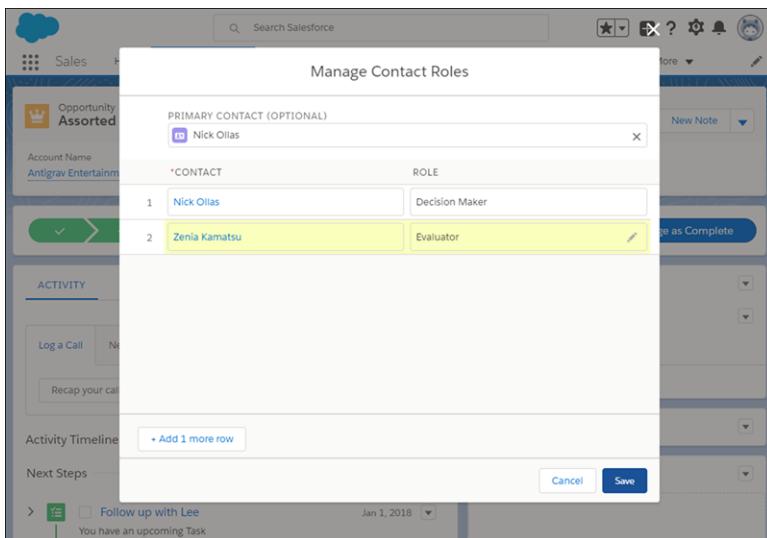
Reps can work more quickly with an improved interface for managing Opportunity contact roles. This change applies to Lightning Experience only.

Locate a Contact's Hierarchy in a Snap

Wondering how your contacts relate to each other? Click the **View Contact Hierarchy** icon in a contact's header to go right to its hierarchy. This change applies to Lightning Experience only.

Update Contact Roles Like a Speed Demon

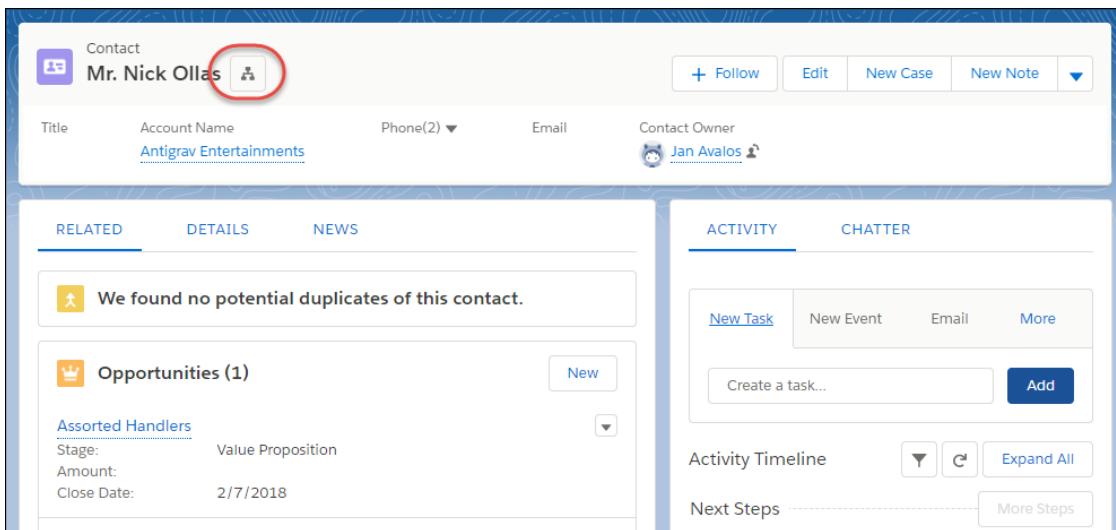
Reps can work more quickly with an improved interface for managing Opportunity contact roles. This change applies to Lightning Experience only.



Add, update, and remove Opportunity Contact Roles, and set the Primary Contact for the opportunity all in one place. Remove Contact Roles by returning to the Contact Roles related list on the Opportunity record detail.

Locate a Contact's Hierarchy in a Snap

Wondering how your contacts relate to each other? Click the **View Contact Hierarchy** icon in a contact's header to go right to its hierarchy. This change applies to Lightning Experience only.



Productivity Features: Sales Console Improvements, Call Monitoring, and Email Enhancements

Help your reps maximize their productivity in Lightning Experience with a slew of console features, Call Monitoring in Lightning Dialer, and list email improvements.

IN THIS SECTION:

[Sales Console: Pinned Regions, Quick Text, Macros, and More](#)

We continue to make great improvements to Lightning console apps. We added the ability to pin page regions, included quick text options, and expanded the power of macros. These changes apply to Lightning Experience only.

[Lightning Dialer: Call Monitoring, "Do Not Call" Numbers](#)

Use call monitoring to coach your reps more effectively, and disable calling with the Do Not Call field. These changes apply to Lightning Experience only.

[Inbox: Scheduling Improvements, Email Tracking, and Productivity Updates](#)

Help your reps become the CEO (Chief Email Officer) of their inbox with full page layouts and read receipts. Plus, with insert availability, reps schedule conversations faster so they can close more deals. These changes apply to Lightning Experience, Inbox for iOS, and Inbox for Android.

[Email Experience: Improvements to List Emails, Updates to Creating Emails, and Other Enhancements](#)

Manage list emails from one screen, include signatures, and see how many more emails you can send. In emails, predefine recipient fields, easily use person accounts, and run spell-check. These changes apply to Lightning Experience and all versions of the Salesforce app.

[Activity Timeline: Updated Timeline and Expanded Einstein Emails](#)

Customize the activity timeline, and see more of your Einstein emails. These changes apply to Lightning Experience only.

[Activity Reminders: Event Reminders, More Reminder Control, and a Clear-All Reminder Option](#)

Reps can stay productive with reminders to attend their important events, individual preferences for task and event reminders, and the ability to remove all reminders with one click. These changes apply to Lightning Experience only.

[Calendar and Events: Attendee Auto-Relate, Attendee Access for More Reps, and Improvements to Shared Events](#)

Reps can relate important meetings to relevant contacts or one lead in fewer steps. More reps have access to the attendees field and can do more with their shared events directly from the calendar. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Home: Do More with the Deals Component](#)

The opportunities component on the Home page has a new name and a filtering feature. Top Deals is now Key Deals. Your reps can filter the opportunities shown in the component to see all their deals, deals closing soon, and other helpful list views. This change applies to Lightning Experience only.

Sales Console: Pinned Regions, Quick Text, Macros, and More

We continue to make great improvements to Lightning console apps. We added the ability to pin page regions, included quick text options, and expanded the power of macros. These changes apply to Lightning Experience only.



Note: Lightning console apps don't yet have full parity with Salesforce Classic console apps.

For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more](#).

You can't migrate Salesforce Classic console apps to Lightning Experience.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer**
Editions with Sales Cloud

Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again

A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Customize your Lightning console app with pinned region pages so that console users can view and work with record information on different subtabs. Choose from three templates to pin a page's header, left sidebar, or both. Previously, this feature was available only in Salesforce Classic consoles.

Supercharge Console Productivity with Quick Text and Macros

Console apps already make your users productive, but we added tools to make them Productivity Rock Stars. Say hello to quick text and more powerful macros.

Reduce the Noise on Your Console Pages with Collapsible Sections

Organize and present information in sections that collapse and expand by customizing your Lightning console app pages with the Accordion component. Only one section is expanded at a time, so your console users can focus on the information they're working with.

SEE ALSO:

[Salesforce Help: Lightning Experience Console Limitations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: What Features Are Available in Lightning Console Apps?](#) (can be outdated or unavailable during release preview)

Lightning Dialer: Call Monitoring, "Do Not Call" Numbers

Use call monitoring to coach your reps more effectively, and disable calling with the Do Not Call field. These changes apply to Lightning Experience only.

EDITIONS



Note: For now, we support outgoing calls to the United States and Canada only.

Available for an additional cost in **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

[Coach Your Sales Reps with Call Monitoring \(Beta\)](#)

It's easier than ever to improve your sales reps' selling techniques with personalized coaching made possible with Call Monitoring. Identify strengths and weaknesses in your reps' interactions, and then improve overall sales performance through coaching. This feature is new in Lightning Experience.

[Set Up Call Monitoring \(Beta\)](#)

Improve selling techniques by enabling Call Monitoring from the Dialer Settings page in Setup. This feature is new in Lightning Experience.

[Disable Click-to-Call with the Do Not Call Field](#)

Have a contact that doesn't want to be called? Select the Do Not Call field on lead, contact, or person account records to disable one-click calling.

[See Numbers Dialed in Call History](#)

Sales reps can now see the specific phone numbers they dialed in the Call History tab instead of just the related record. Having the exact number displayed is especially useful if there are multiple numbers tied to a record, because reps can easily see which numbers were tried already. This feature is new in Lightning Experience.

[Record Messages with Better Audio Quality](#)

We've improved the quality of our audio recordings. All new voicemail greetings and voicemail drop messages have a filter that reduces the sibilance—the "s" sound. Reps can rerecord their current messages with the new filter. This feature is new in Lightning Experience.

Coach Your Sales Reps with Call Monitoring (Beta)

It's easier than ever to improve your sales reps' selling techniques with personalized coaching made possible with Call Monitoring. Identify strengths and weaknesses in your reps' interactions, and then improve overall sales performance through coaching. This feature is new in Lightning Experience.

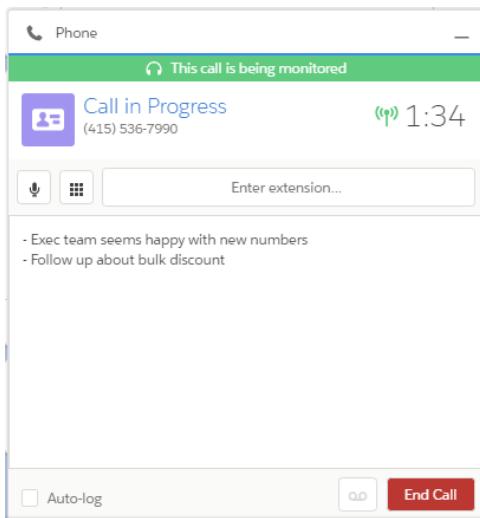


Note: This release contains a beta version of Call Monitoring, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. Call Monitoring isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Call Monitoring in the [IdeaExchange group in the Trailblazer Community](#).

To coach your reps, click the **Monitor** tab in the call panel. The panel displays the users that report directly to you.

Click **Listen** to monitor a rep's calls. Dialer waits for your sales rep's next call and automatically connects you when a call is placed.

Reps see a banner if their call is being monitored.



You can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.

Set Up Call Monitoring (Beta)

Improve selling techniques by enabling Call Monitoring from the Dialer Settings page in Setup. This feature is new in Lightning Experience.

To use Call Monitoring, your org must have:

- Lightning Dialer enabled
- Role hierarchy set up

USER PERMISSIONS

To enable Dialer features:

- Customize Application

 **Note:** This release contains a beta version of Call Monitoring, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. Call Monitoring isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Call Monitoring in the [IdeaExchange group in the Trailblazer Community](#).

1. From Setup, enter *Dialer Settings* in the Quick Find box, then select **Dialer Settings**.
2. Enable Call Monitoring.
3. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
4. Click **New**.
5. Enter a name for the permission set.
Naming it *Call Monitoring* makes it easy to identify.
6. Click **Save**.
7. Click **App Permissions**.
8. Click **Edit**.
9. Select **Access Dialer Monitoring**.
10. Click **Save**.

11. From Setup, enter *Users* in the Quick Find box, then select **Users**.
12. Select a manager who you want to grant Call Monitoring to.
13. In the Permission Set Assignments related list, click **Edit Assignments**.
14. Assign the Call Monitoring permission set.
15. Click **Save**.
16. Repeat steps 12–15 for other managers you want to grant Call Monitoring access to.

Disable Click-to-Call with the Do Not Call Field

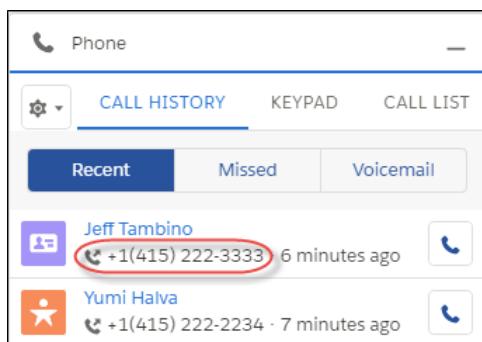
Have a contact that doesn't want to be called? Select the Do Not Call field on lead, contact, or person account records to disable one-click calling.

The screenshot shows the 'Edit' screen for a contact named 'Abbie Deaver'. On the left, there's a 'Do Not Call' checkbox which is checked. To the right, there are several input fields: 'Lead Status' set to 'Nurturing', 'Phone' set to '415-555-6666', 'Lead Owner' set to 'Admin User', and another 'Admin User' field below it. The interface has a clean, modern design with a light gray background and white input fields.

If you don't see the Do Not Call field, you might need to add it to the object's page layout. From Setup, enter *Object Manager* in the Quick Find box, then select **Object Manager**. Select an object, add the Do Not Call field to the page layout, and save.

See Numbers Dialed in Call History

Sales reps can now see the specific phone numbers they dialed in the Call History tab instead of just the related record. Having the exact number displayed is especially useful if there are multiple numbers tied to a record, because reps can easily see which numbers were tried already. This feature is new in Lightning Experience.



Record Messages with Better Audio Quality

We've improved the quality of our audio recordings. All new voicemail greetings and voicemail drop messages have a filter that reduces the sibilance—the "s" sound. Reps can rerecord their current messages with the new filter. This feature is new in Lightning Experience.

Inbox: Scheduling Improvements, Email Tracking, and Productivity Updates

Help your reps become the CEO (Chief Email Officer) of their inbox with full page layouts and read receipts. Plus, with insert availability, reps schedule conversations faster so they can close more deals. These changes apply to Lightning Experience, Inbox for iOS, and Inbox for Android.

-  **Note:** Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

[Use Full Page Layouts to Create Records](#)

Teams can update all the fields on their records from the comfort of their inbox. That way, teams save time, reduce context switching, and get more done on desktop and mobile. This change applies to Lightning Experience.

[Schedule Meetings on Behalf of Others](#)

Sales team members can be proactive and help out their colleagues by scheduling meetings for other team members. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

[Schedule Meetings Easier By Seeing Who's Free](#)

Toggling between calendar and email to schedule meetings is a thing of the past. Now sales teams can see coworkers' shared calendars from the comfort of their inbox with the insert availability feature. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

[See Who's Engaging with Email](#)

If an email is sent and no one clicks the links, does it make an impact? You don't have to answer that age-old question if you use link tracking. Now, marketers and sales teams can see who's reading their emails and clicking through each link. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

[Prevent Read Receipts to Enhance Privacy](#)

Prevent users from getting read receipts for email messages they send. Read receipts include information such as when the recipient opens the message and from where. Laws and regulations can require you to honor and respect your customers' wishes regarding the personal data you collect. This feature applies only to Lightning Experience.

[Predict Priorities with Einstein Email Insights](#)

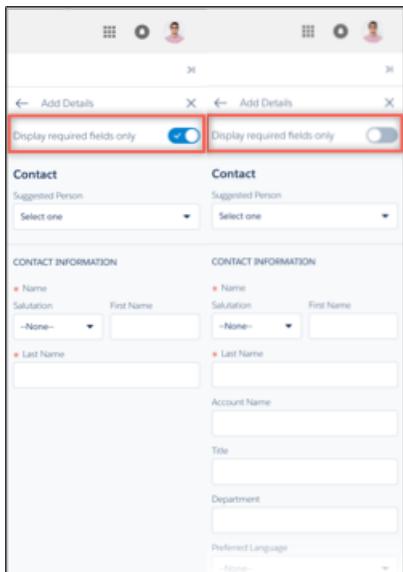
Spend less time in your inbox and more time winning your next deal with Einstein Email Insights. Einstein prioritizes the emails in your inbox and provides recommendations on how to respond. This change applies to Salesforce Inbox on iOS and Android.

[Use Full Page Layouts to Create Records](#)

Teams can update all the fields on their records from the comfort of their inbox. That way, teams save time, reduce context switching, and get more done on desktop and mobile. This change applies to Lightning Experience.

EDITIONS

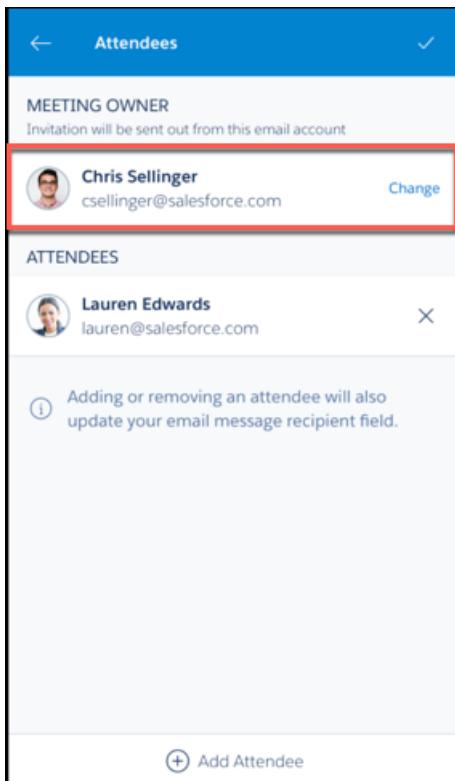
Inbox is available for an extra cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions



Reps can choose to display only required fields or all the fields on the record.

Schedule Meetings on Behalf of Others

Sales team members can be proactive and help out their colleagues by scheduling meetings for other team members. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

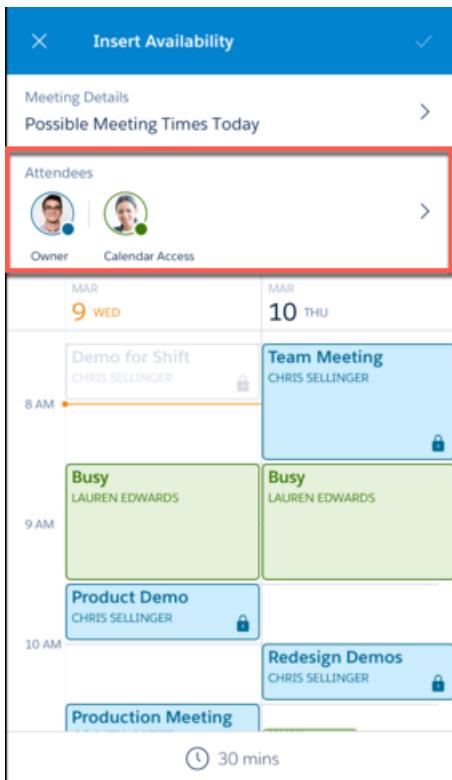


- Note:** In addition to using Inbox, a user must either share calendar access or be a part of the same Salesforce org to schedule a meeting on their behalf.

Your sales teams schedule the meeting as they normally would, but change the meeting owner to another person on their team. The new meeting owner, your teammate, has control over communications and changes to the invitation.

Schedule Meetings Easier By Seeing Who's Free

Toggling between calendar and email to schedule meetings is a thing of the past. Now sales teams can see coworkers' shared calendars from the comfort of their inbox with the insert availability feature. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.



To see a coworker's availability on the calendar, reps can add the coworker to the attendee list.

For Inbox users to see each other's availability, they must either share calendar access or be a part of the same Salesforce org.

SEE ALSO:

[Salesforce Help: Insert Availability to Optimize Scheduling](#) (can be outdated or unavailable during release preview)

See Who's Engaging with Email

If an email is sent and no one clicks the links, does it make an impact? You don't have to answer that age-old question if you use link tracking. Now, marketers and sales teams can see who's reading their emails and clicking through each link. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

Chrome user select Link Tracking in the read receipts engagement tab. Outlook users select Link Tracking from the read receipts folder.

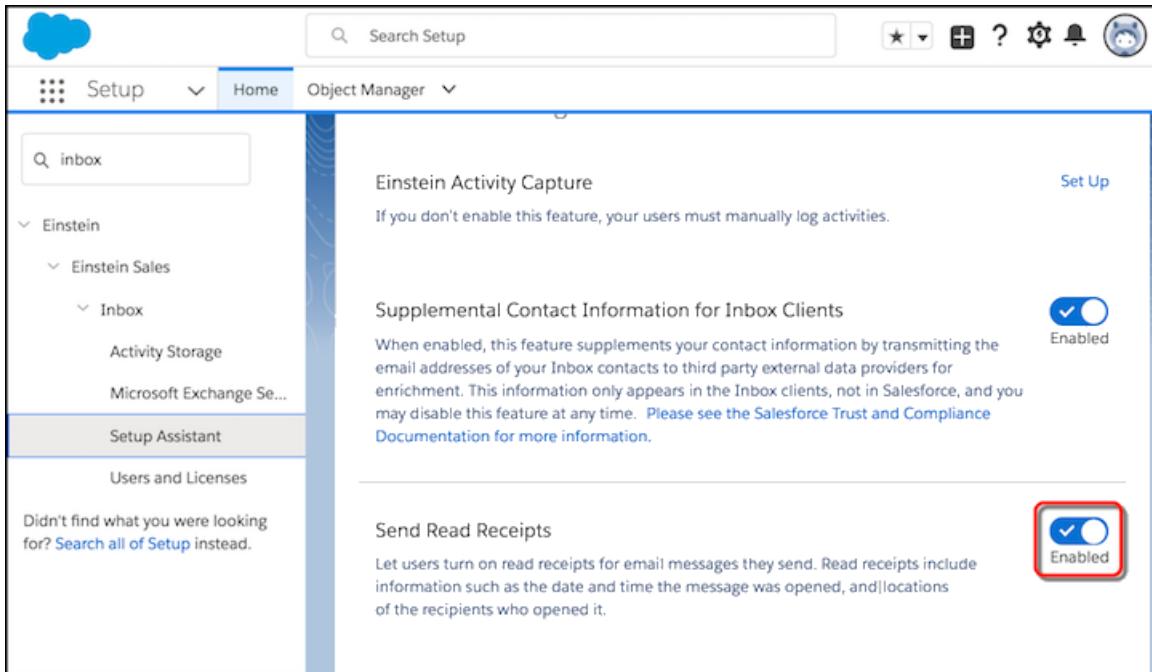
Prevent Read Receipts to Enhance Privacy

Prevent users from getting read receipts for email messages they send. Read receipts include information such as when the recipient opens the message and from where. Laws and regulations can require you to honor and respect your customers' wishes regarding the personal data you collect. This feature applies only to Lightning Experience.

Here are a couple laws that are important to many companies collecting and processing their customers' data.

- General Data Protection Regulation (GDPR), European Union
- Gramm-Leach-Bliley Act (GLB Act), United States

To prevent users from getting read receipts, from Setup, enter *Inbox* in the Quick Find box, then select **Setup Assistant**. Toggle the Send Read Receipts setting to **Disabled**.



Predict Priorities with Einstein Email Insights

Spend less time in your inbox and more time winning your next deal with Einstein Email Insights. Einstein prioritizes the emails in your inbox and provides recommendations on how to respond. This change applies to Salesforce Inbox on iOS and Android.

Here are the four insights to help you manage your email better than ever.

Executive Involved

A customer sent you an email with a new executive-level decision maker copied.

Scheduling Intent

You received an email with a call to action to schedule a meeting.

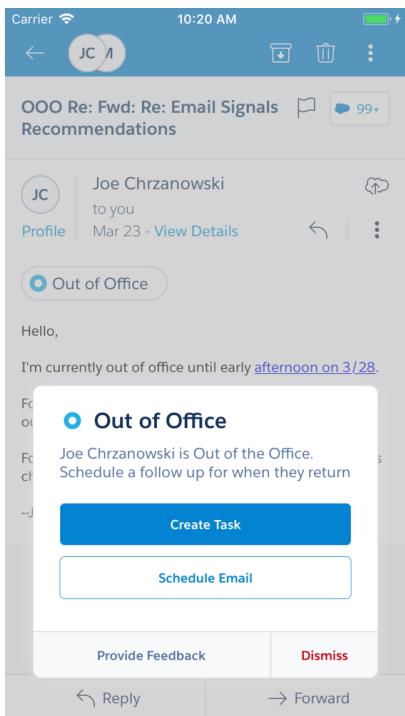
Pricing Mentioned

Pricing was discussed in the subject or body of an email you received.

Out of Office

Your point of contact is currently away, and you need to follow up with someone else.

A notification appears at the top of an email when Einstein determines that one of the four insights applies. When a rep taps on the insight, a list of follow-up actions appears.



Email Experience: Improvements to List Emails, Updates to Creating Emails, and Other Enhancements

Manage list emails from one screen, include signatures, and see how many more emails you can send. In emails, predefine recipient fields, easily use person accounts, and run spell-check. These changes apply to Lightning Experience and all versions of the Salesforce app.

IN THIS SECTION:

[Increase Your Efficiency by Managing List Emails in One Place](#)

With the List Emails tab, your reps now manage all their list email tasks in one place. This change applies to Lightning Experience only.

[Edit Email Signatures Before Sending a List Email](#)

The default email signature now appears in the email composer when you use list emails. Reps have the option of editing the signature before sending the list email, ensuring that it's personalized and accurate. This change applies to Lightning Experience only.

[Review How Many List Emails You Can Send](#)

Reps no longer have to wonder if they can send their list email. The email composer shows how many more emails remain out of your org's daily limit. This change applies to Lightning Experience only.

[Email Person Accounts Faster](#)

Reps can now easily send an email to a person account. If a person account record has an email address, the Send Email action fills in the To field with that name and email address. This change applies to Lightning Experience and all versions of the Salesforce app.

[Send Emails with Predefined Recipients](#)

Predefine a recipient in the email action to simplify and enforce your business process while increasing accuracy. This change applies to Lightning Experience and all versions of the Salesforce app.

EDITIONS

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions

[Cross Email Spell-Check off Your To-Do List](#)

Reps don't have to hassle with running spell-check before sending an email. The browser's spell checker is available in the email composer. This change applies to Lightning Experience and all versions of the Salesforce app.

[Save Time Creating Emails](#)

We made it more efficient to get through the task at hand. When selecting an email template, you see your five most recently used templates. This change applies to Lightning Experience and all versions of the Salesforce app.

[Track Encryption in Email Logs](#)

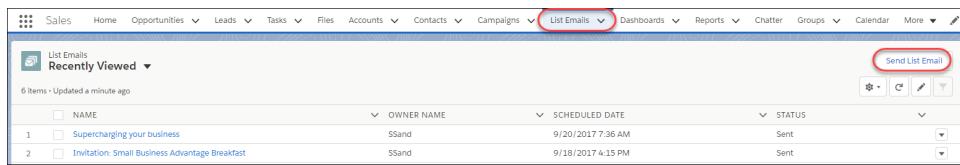
Email log files have two fields that describe the transport layer security (TLS) your email server uses: `TLS_Cipher` and `TLS_Verified`. Use these fields to determine your Salesforce org's use of TLS and evaluate the impact of the deprecation of TLS 1.0. This change applies to both Lightning Experience and Salesforce Classic.

Increase Your Efficiency by Managing List Emails in One Place

With the List Emails tab, your reps now manage all their list email tasks in one place. This change applies to Lightning Experience only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions



SEE ALSO:

[Salesforce Help: Send a List Email in Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Considerations for Sending List Email in Lightning Experience](#) (can be outdated or unavailable during release preview)

Edit Email Signatures Before Sending a List Email

The default email signature now appears in the email composer when you use list emails. Reps have the option of editing the signature before sending the list email, ensuring that it's personalized and accurate. This change applies to Lightning Experience only.

EDITIONS

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SEE ALSO:

[Salesforce Help: Edit Your Email Settings](#) (can be outdated or unavailable during release preview)

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Reps no longer have to wonder if they can send their list email. The email composer shows how many more emails remain out of your org's daily limit. This change applies to Lightning Experience only.

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Reps can now easily send an email to a person account. If a person account record has an email address, the Send Email action fills in the To field with that name and email address. This change applies to Lightning Experience and all versions of the Salesforce app.

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Send Emails with Predefined Recipients

Predefine a recipient in the email action to simplify and enforce your business process while increasing accuracy. This change applies to Lightning Experience and all versions of the Salesforce app.

For the fields To, CC, and BCC, use ID fields such as `Contact.Id` and string fields such as `Contact.custom_email_field` to predefined the field value.

SEE ALSO:

[Salesforce Help: Notes on Predefined Field Values for Quick Actions](#) (can be outdated or unavailable during release preview)

Editions

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Cross Email Spell-Check off Your To-Do List

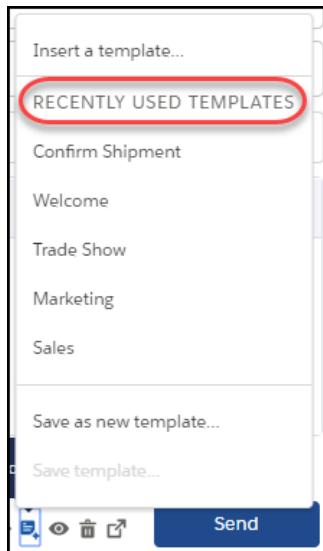
Reps don't have to hassle with running spell-check before sending an email. The browser's spell checker is available in the email composer. This change applies to Lightning Experience and all versions of the Salesforce app.

Editions

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Save Time Creating Emails

We made it more efficient to get through the task at hand. When selecting an email template, you see your five most recently used templates. This change applies to Lightning Experience and all versions of the Salesforce app.



Editions

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Track Encryption in Email Logs

Email log files have two fields that describe the transport layer security (TLS) your email server uses: `TLS_Cipher` and `TLS_Verified`. Use these fields to determine your Salesforce org's use of TLS and evaluate the impact of the deprecation of TLS 1.0. This change applies to both Lightning Experience and Salesforce Classic.

Use the logs to determine whether an email was encrypted, which version of TLS was used, and whether the peer certification was verified against the configured certificate authorities.

SEE ALSO:

[Knowledge Article: Salesforce TLS 1.0 Email Disablement](#)

[Salesforce Help: Email Log Reference](#) (can be outdated or unavailable during release preview)

Editions

Available in: **All Editions**

Activity Timeline: Updated Timeline and Expanded Einstein Emails

Customize the activity timeline, and see more of your Einstein emails. These changes apply to Lightning Experience only.

Editions

Available in: **All Editions**

IN THIS SECTION:

[Adjust the Number of Activities on the Activity Timeline](#)

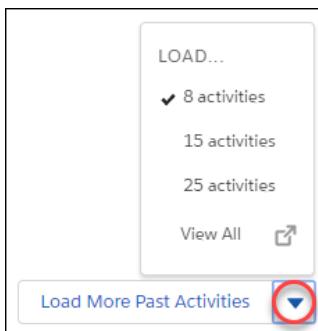
Whenever they want, reps can change how many activities to see on the activity timeline. This change applies to Lightning Experience only.

Dive Deep with Expanding Einstein Emails in the Activity Timeline

When reps expand an Einstein Activity Capture email from within the activity timeline, they can view its contents without going to the email itself. This change applies to Lightning Experience only.

Adjust the Number of Activities on the Activity Timeline

Whenever they want, reps can change how many activities to see on the activity timeline. This change applies to Lightning Experience only.



EDITIONS

Available in: **All** Editions except Essentials

Click the **Load More Past Activities** dropdown list to choose how many activities to show.

Your selection is temporary. When you leave the view and then return, you see the default number of activities: at most, two items under Next Steps and eight items under Past Activity.

Dive Deep with Expanding Einstein Emails in the Activity Timeline

When reps expand an Einstein Activity Capture email from within the activity timeline, they can view its contents without going to the email itself. This change applies to Lightning Experience only.

Activity Reminders: Event Reminders, More Reminder Control, and a Clear-All Reminder Option

Reps can stay productive with reminders to attend their important events, individual preferences for task and event reminders, and the ability to remove all reminders with one click. These changes apply to Lightning Experience only.

EDITIONS

Available in: **All** Editions

IN THIS SECTION:

[Don't Forget to Remember with Event Reminders](#)

Whether reps are scheduling a customer meeting or checking in with colleagues, setting reminders keeps them on time. Reminders pop up on the top right corner of reps' browsers. They also get reminded in the global navigation notification list. This feature is new in Lightning Experience.

[Fine-Tune Activity Reminders](#)

You and your reps can now set individual preferences for task and event reminders, tailoring these features to work the way you want to work. This change applies to Lightning Experience only.

[Clear All Reminders at Once](#)

No more sifting through individual reminders. Clear all task and event reminders with one click. The **Clear All** button appears after you've received a fourth notification. After you clear all reminders, only new reminders appear. This feature is new in Lightning Experience.

Don't Forget to Remember with Event Reminders

Whether reps are scheduling a customer meeting or checking in with colleagues, setting reminders keeps them on time. Reminders pop up on the top right corner of reps' browsers. They also get reminded in the global navigation notification list. This feature is new in Lightning Experience.

To set individual event reminders, reps select the **Reminder Set** option from events and indicate when they want to be reminded. Reps can adjust default reminder settings and reminder times for all-day events from Calendars and Reminders in their personal settings.

Enable reminders for reps from Setup. Add the Reminder Set field to Event page layouts, and make sure that activity reminders (in Activity Settings) and in-app notifications (in Salesforce Notifications) are enabled.

Although reps can set event reminders from Lightning Experience or the Salesforce app, these settings trigger reminders from Lightning Experience only. Learn more about all event reminders considerations in Salesforce Help.

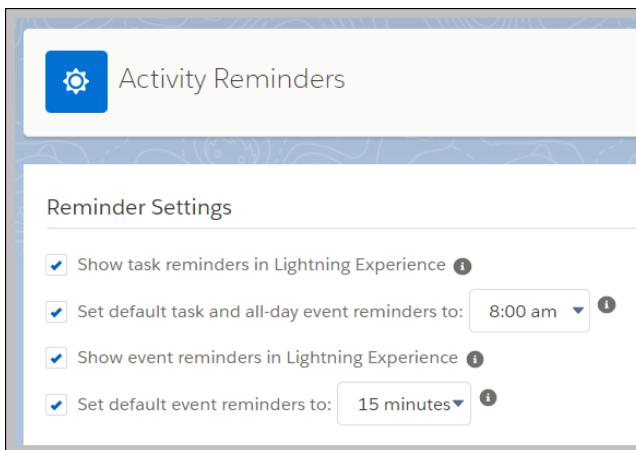
SEE ALSO:

[Spring '18 Features That Are Different or Not Available in the Salesforce App](#)

[What's Different or Not Available in Spring '18 Lightning Experience Features](#)

Fine-Tune Activity Reminders

You and your reps can now set individual preferences for task and event reminders, tailoring these features to work the way you want to work. This change applies to Lightning Experience only.



SEE ALSO:

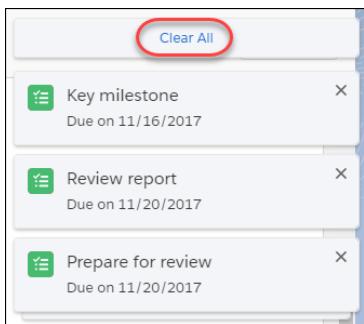
[Salesforce Help: Access Your Personal Settings in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Clear All Reminders at Once

No more sifting through individual reminders. Clear all task and event reminders with one click. The **Clear All** button appears after you've received a fourth notification. After you clear all reminders, only new reminders appear. This feature is new in Lightning Experience.

Editions

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions



Calendar and Events: Attendee Auto-Relate, Attendee Access for More Reps, and Improvements to Shared Events

Reps can relate important meetings to relevant contacts or one lead in fewer steps. More reps have access to the attendees field and can do more with their shared events directly from the calendar. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

EDITIONS

Available in: **All** Editions

IN THIS SECTION:

[Automatically Relate Important Meetings to Contacts and Leads](#)

Now it's no sweat to track important sales meetings so that reps, coworkers, and managers can easily recall details. When reps invite a contact or lead to a meeting, you can set up those records to relate to the event automatically. Related events show up on contact and lead related tabs and the activity timelines, giving reps a 360-degree view of their deals. This feature is new in Lightning Experience. This feature also requires Lightning Sync.

[Give More Reps Access to Attendees](#)

More reps can see which contacts, leads, and other Salesforce users are invited to their meetings, and others can extend invitations. The attendees field is now available for reps on Microsoft® Exchange 2016 and 2013, and for reps syncing events in any direction. This change applies to Lightning Experience and all versions of the Salesforce app. This feature also requires Lightning Sync.

[Work with Coworkers' Events More Easily in Lightning Experience](#)

Reps who have access to edit their coworkers' events and see their calendars no longer have to search for coworkers' events to make changes. Instead, reps can edit coworkers' events directly from the calendar view. Plus, reps can see any customized event layouts that you've created. That way, events look the same to reps whether they own the events or their coworkers own them. This change applies to Lightning Experience only.

[Add to Outlook Button Is Now Export Events](#)

We spruced up the Add to Outlook button, and you'd barely recognize 'er! We updated the product name and label, because now you can export your event to any calendar. This change applies to Salesforce Classic only.

Automatically Relate Important Meetings to Contacts and Leads

Now it's no sweat to track important sales meetings so that reps, coworkers, and managers can easily recall details. When reps invite a contact or lead to a meeting, you can set up those records to relate to the event automatically. Related events show up on contact and lead related tabs and the activity timelines, giving reps a 360-degree view of their deals. This feature is new in Lightning Experience. This feature also requires Lightning Sync.

EDITIONS

Available in: **Professional, Enterprise, Unlimited, and Developer** Editions

Here's how it works. First, set up reps to auto-relate attendees. From Activity Settings in Setup, select **Auto-relate attendees to users' events in Lightning Experience** and **Allow users to relate multiple contacts to tasks and events**.

Then, when a rep adds attendees to an event, it's related to up to 50 contacts or one lead—whichever the rep adds first.

After saving the event, reps, their coworkers, and managers can recall that activity from the related tab and the activity timeline without taking any extra steps.

Give More Reps Access to Attendees

More reps can see which contacts, leads, and other Salesforce users are invited to their meetings, and others can extend invitations. The attendees field is now available for reps on Microsoft® Exchange 2016 and 2013, and for reps syncing events in any direction. This change applies to Lightning Experience and all versions of the Salesforce app. This feature also requires Lightning Sync.

How your reps can work with attendees in Lightning Experience and the Salesforce app depends on how you set them up for Lightning Sync.

SEE ALSO:

[Give More Google Users Access to Attendees](#)

[Give More Microsoft® Exchange Users Access to Attendees](#)

EDITIONS

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Work with Coworkers' Events More Easily in Lightning Experience

Reps who have access to edit their coworkers' events and see their calendars no longer have to search for coworkers' events to make changes. Instead, reps can edit coworkers' events directly from the calendar view. Plus, reps can see any customized event layouts that you've created. That way, events look the same to reps whether they own the events or their coworkers own them. This change applies to Lightning Experience only.

Now reps can edit coworker's events directly from the calendar when they have access to:

- See events through calendar sharing
- Edit events through sharing permissions

Reps can edit shared events by opening the event detail page or the event preview card.

Add to Outlook Button Is Now Export Events

We spruced up the Add to Outlook button, and you'd barely recognize 'er! We updated the product name and label, because now you can export your event to any calendar. This change applies to Salesforce Classic only.

When reps click **Export Events** from event detail pages, they get an .ics file that they can save and import into other calendar applications. Calendars such as Microsoft® Outlook®, Google Calendar™, and iCal® support .ics files.

The new file format retains these details, so you can import them into other calendars.

- Full UTF-8 encoding for multi-language support
- Attendee and attendance status
- Last modified and created dates
- Reminder settings and details

EDITIONS

Available in: **All** Editions except Essentials

Home: Do More with the Deals Component

The opportunities component on the Home page has a new name and a filtering feature. Top Deals is now Key Deals. Your reps can filter the opportunities shown in the component to see all their deals, deals closing soon, and other helpful list views. This change applies to Lightning Experience only.

Key Deals - All Opportunities	
Acme - 1,200 Widgets	Acme - 5/26/2014 - \$140,000.00
Acme - 200 Widgets	Acme - 9/24/2014 - \$20,000.00
Acme - 600 Widgets	Acme - 7/22/2014 - \$70,000.00
Global Media - 400 Widgets	Global Media - 6/24/2014 - \$40,000.00

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Data Quality: Global Duplicate Management, Company Search and Import

Duplicate jobs give you control over duplicate accounts, contacts, and leads. And sales teams using Discover Companies can fill their pipeline with new prospects. These features are new in Lightning Experience.

IN THIS SECTION:

[Stay on Top of Duplicate Records by Using Duplicate Jobs](#)

Good clean data builds the trust of your sales team. It also helps you work toward complying with various data protection and privacy regulations. So you've got everything to gain by getting a global view of duplicate records. Use duplicate jobs with standard or custom matching rules to scan your Salesforce business or person accounts, contacts, or leads for duplicates. Share job results with others and merge the duplicates—all within Salesforce. Use information about duplicate jobs you've run to track your progress in reducing duplicate records. This feature is new in Lightning Experience.

[Use Discover Companies to Put a Treasure Trove in Your Sales Pipeline](#)

Give your sales team a better way to prospect for new customers. When you license Lightning Data packages, sales reps can use powerful search filters to find companies, and then import them into Salesforce as accounts. You assign credits for importing records to each user. This feature is new in Lightning Experience.

SEE ALSO:

[Include Encrypted Fields in Matching Rules Used in Duplicate Management \(Beta\)](#)

EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited Editions**

Stay on Top of Duplicate Records by Using Duplicate Jobs

Good clean data builds the trust of your sales team. It also helps you work toward complying with various data protection and privacy regulations. So you've got everything to gain by getting a global view of duplicate records. Use duplicate jobs with standard or custom matching rules to scan your Salesforce business or person accounts, contacts, or leads for duplicates. Share job results with others and merge the duplicates—all within Salesforce. Use information about duplicate jobs you've run to track your progress in reducing duplicate records. This feature is new in Lightning Experience.

1. From Setup, in the Quick Find box, enter *Duplicate Jobs*, and then click **Duplicate Jobs**.
2. Click **New Job**.

JOB	MATCHING RULE	DUPLICATES	SCANNED	CREATED BY	STARTED	JOB STATUS
Contact 2017-09-10 10:35 ...	Standard Contact Matching Rule v1.1	20	59	Ruby Lee	Sep 11, 2017 10:36:12 PM	Completed
Lead 2017-09-11 10:12 AM	Standard Lead Matching Rule v1.1	11	35	Yves Martin	Sep 11, 2017 10:12:31 AM	Results Deleted
Testing cancel job	Standard Lead Matching Rule v1.1	0	35	Yves Martin	Sep 11, 2017 10:10:01 AM	Canceled

3. Select an object and then a matching rule. Use an existing rule or create one. If you like, edit the default job name. Click **Run**.

You can cancel the job in progress.

When a job is finished, we notify you by email.

4. To view and manage job results, click a duplicate job name and then a duplicate record set name. Click the **Related** tab.
To share the results of duplicate jobs, create reports.
5. To merge records in a set, on the job summary page, select **Compare and Merge**.

SEE ALSO:

[Salesforce Help: Create Reports on Duplicate Records](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Manage Duplicates Using Duplicate Record Sets](#) (can be outdated or unavailable during release preview)

EDITIONS

Available in: **Performance** and **Unlimited** Editions

USER PERMISSIONS

To run duplicate jobs:

- Customize Application

Use Discover Companies to Put a Treasure Trove in Your Sales Pipeline

Give your sales team a better way to prospect for new customers. When you license Lightning Data packages, sales reps can use powerful search filters to find companies, and then import them into Salesforce as accounts. You assign credits for importing records to each user. This feature is new in Lightning Experience.

After you activate the data integration rule in a Lightning Data package and assign data credits to users, a Discover Companies button on the Accounts page gives your sales team access to a search page.

To use Discover Companies, each user must have Create and Read permission on accounts and Read and Edit permission on all fields in the external object included in the package.

The screenshot shows the 'Accounts' page in Lightning Experience. At the top right, there is a 'Discover Companies' button, which is highlighted with a red box. Below the header, there is a search bar and some filter options. A table below lists two account entries: '107th Street Math and Science Ma...' and '109th Street Elementary School', both located in Los Angeles, CA.

A sales rep can choose a data source (1), search (2), and filter the search results (3). Filters vary by package.

The screenshot shows the 'Discover Companies' search interface. It includes a search bar with the term 'acme' (2), a 'DATA SOURCE' dropdown set to 'DATAFOX' (1), and a 'Filters' sidebar on the right containing sections for 'CITY' and 'COMPANY STATUS' (3).

Sales reps can select records and use their credits to purchase them. The status shows whether the record has been imported already.

The screenshot shows the 'Import' screen where several records have been selected for import. The table includes columns for COMPANY NAME, CITY, STATE, COUNTRY, DOMAIN / PHONE, and STATUS. The 'Import' button is located at the bottom right of the table.

COMPANY NAME	CITY	STATE	COUNTRY	DOMAIN / PHONE	STATUS
<input checked="" type="checkbox"/> Acme Computer Services	BRUNSWICK	ME	US	(***).***.****	In View
<input checked="" type="checkbox"/> Acme Design Group Inc				acme-designgroup.com	New
<input checked="" type="checkbox"/> Acme International Enterprises, Inc				acme-usa.com	New
<input checked="" type="checkbox"/> Acme Enterprises Inc	Roseville	MI	US	www.acme-enterprises.com (***).***.****	New
<input checked="" type="checkbox"/> Acme Supply, Inc.				www.acme-supply.com	New
<input checked="" type="checkbox"/> Acme Intl Usa				www.acme-co.com.au	New

Google Integration: Flexible Record Creation, More Opportunity Insights, and More Sync Options

Get your reps working their Salesforce deals directly from Gmail™ and Google Calendar™. Lightning for Gmail provides reps flexibility to add records from emails that don't match a person in Salesforce. More Einstein insights and auto-completed record fields get reps working faster. Plus, help reps stay productive with more sync features, like person account sync, a new sync direction, and more availability for event attendee sync. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

IN THIS SECTION:

[Lightning for Gmail: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence](#)

Create records and capture more information with ease from emails without a record match and leverage more artificial intelligence for leads in your emails with Einstein Opportunity Scoring and Opportunity Insights. This change applies to both Lightning Experience and Salesforce Classic.

[Lightning Sync for Google: More Sync Options, More Event Attendees Availability, and Redesigned Setup](#)

Get more flexibility to sync reps' items the way that's best for your business. Sync person accounts, select to sync events from Google Calendar to Salesforce only, and give more reps access to view, edit, and sync event attendees. Check out our new streamlined setup page, combined with Lightning for Gmail Settings. If you use both products, configure them from one convenient place. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Lightning for Gmail: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence

Create records and capture more information with ease from emails without a record match and leverage more artificial intelligence for leads in your emails with Einstein Opportunity Scoring and Opportunity Insights. This change applies to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts](#)

When a rep receives an email from an address that doesn't match an email in a record in Salesforce, the rep can create a contact, lead, or person account (if Salesforce is set up with person accounts) directly from Lightning for Gmail. The flexibility to select the record type lets reps work how they want, or to align with your business processes for adding information to Salesforce. This change applies to both Lightning Experience and Salesforce Classic.

[Get More Context in Chatter Notification Emails](#)

When reps select Chatter notification emails in their inbox, Lightning for Gmail now shows the profile information for the user who made the post in Chatter. It also includes the record the comment was posted on. Lightning for Gmail is also smarter about matching email addresses to records in Salesforce, and no longer asks reps to create a user representing the Chatter email address (reply@chatter.salesforce.com). These changes apply to both Lightning Experience and Salesforce Classic.

[Focus Work with Einstein Opportunity Scores and Insights in Gmail](#)

Your reps see lots of opportunities in a day. To help them prioritize their work, reps can see the opportunity score and the top insight in Lightning for Gmail. This change applies to Lightning Experience only.

Editions

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Let Lightning for Gmail Do Your Typing](#)

Data entry isn't any fun. When reps create records from the Action Publisher in Lightning for Gmail, more content is pulled from the selected email and entered in Salesforce fields. For example, the email address is entered when adding a person account, and a matching account is suggested when adding a contact, along with other fields. This change applies to both Lightning Experience and Salesforce Classic.

Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts

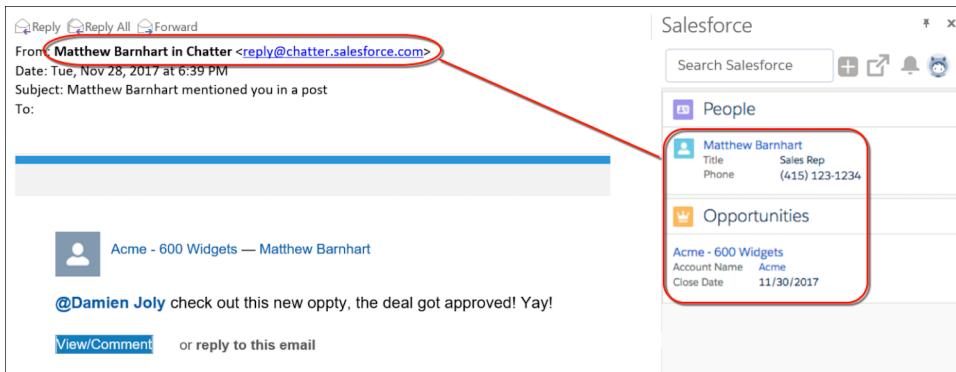
When a rep receives an email from an address that doesn't match an email in a record in Salesforce, the rep can create a contact, lead, or person account (if Salesforce is set up with person accounts) directly from Lightning for Gmail. The flexibility to select the record type lets reps work how they want, or to align with your business processes for adding information to Salesforce. This change applies to both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Get More Context in Chatter Notification Emails](#)

Get More Context in Chatter Notification Emails

When reps select Chatter notification emails in their inbox, Lightning for Gmail now shows the profile information for the user who made the post in Chatter. It also includes the record the comment was posted on. Lightning for Gmail is also smarter about matching email addresses to records in Salesforce, and no longer asks reps to create a user representing the Chatter email address (reply@chatter.salesforce.com). These changes apply to both Lightning Experience and Salesforce Classic.



SEE ALSO:

[Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts](#)

Focus Work with Einstein Opportunity Scores and Insights in Gmail

Your reps see lots of opportunities in a day. To help them prioritize their work, reps can see the opportunity score and the top insight in Lightning for Gmail. This change applies to Lightning Experience only.

If you've enabled Einstein Opportunity Scoring, reps using Lightning for Gmail see a score that indicates how likely an opportunity is to close. If you've enabled Einstein Opportunity Insights, reps see the top opportunity insight, such as a key moment. This layer of intelligence helps reps focus their work on the right opportunities. More opportunity insights are available from View More, opportunity records, and the Home page.

The screenshot shows the Opportunities page for an opportunity named "Edge Emergency Generator". Key details include Account Name: "Edge Communications", Close Date: "6/28/2015", and an Opportunity Score of 87. Below these, there's a section titled "Top Insight" which says "Prospect has not responded". A red circle highlights this section and the "Opportunity Score" above it.

Hovering over score or insight shows details.

The first screenshot shows a tooltip for the "Einstein Score" of 87, which includes a small Einstein icon and the text "Top Positives" and "Opportunity is unlikely to close in time". The second screenshot shows a tooltip for the "Prospect has not responded" insight, which includes a list of recent activities: "We usually hear from a prospect within 3 days, but we haven't heard back in 14 days.", "Relevant Activity - 2 months ago: Insight Call #771Yr", and "... We would like also consult with Microsoft and ...".

SEE ALSO:

[Einstein Opportunity Scoring: Artificial Intelligence for Opportunities \(Generally Available\)](#)

[Salesforce Help: Einstein Opportunity Insights \(can be outdated or unavailable during release preview\)](#)

Let Lightning for Gmail Do Your Typing

Data entry isn't any fun. When reps create records from the Action Publisher in Lightning for Gmail, more content is pulled from the selected email and entered in Salesforce fields. For example, the email address is entered when adding a person account, and a matching account is suggested when adding a contact, along with other fields. This change applies to both Lightning Experience and Salesforce Classic.

Lightning Sync for Google: More Sync Options, More Event Attendees Availability, and Redesigned Setup

Get more flexibility to sync reps' items the way that's best for your business. Sync person accounts, select to sync events from Google Calendar to Salesforce only, and give more reps access to view, edit, and sync event attendees. Check out our new streamlined setup page, combined with Lightning for Gmail Settings. If you use both products, configure them from one convenient place. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Sync Events from Salesforce to Google Calendar™ Only](#)

Do your reps prefer to work with events from Salesforce, but you want to get those events into Google Calendar, too? Now you can set up events to sync from Salesforce to Google only. This change applies to Lightning Experience and all versions of the Salesforce app.

[Sync Person Accounts with Google Contacts](#)

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between Salesforce and Google Contacts. That way, reps no longer have to maintain contact records in both systems. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Give More Google Users Access to Attendees](#)

Now reps who sync events from Salesforce to Google can add, remove, and edit attendees. Reps set up to sync events in any direction can see and sync attendees. This change applies to Lightning Experience and all versions of the Salesforce app. This feature requires Lightning Sync.

[Manage Lightning for Gmail and Lightning Sync Settings Easily](#)

Lightning for Gmail and Lightning Sync, together at last. We've combined setup for both features, making it more convenient for you to manage these products from the same place. This change applies to both Lightning Experience and Salesforce Classic.

Sync Events from Salesforce to Google Calendar™ Only

Do your reps prefer to work with events from Salesforce, but you want to get those events into Google Calendar, too? Now you can set up events to sync from Salesforce to Google only. This change applies to Lightning Experience and all versions of the Salesforce app.

SEE ALSO:

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Google](#) (can be outdated or unavailable during release preview)

Sync Person Accounts with Google Contacts

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between Salesforce and Google Contacts. That way, reps no longer have to maintain contact records in both systems. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Here's how it works. First, work with your Google admin to set up Lightning Sync. If you've enabled person accounts in Salesforce, reps' person accounts sync to Google as contacts.

Next, let your reps know how person accounts sync with Google Contacts based on the sync directions you've selected. For example, if reps are syncing both ways or from Google to Salesforce only, have reps create person accounts in Salesforce only. That's because Gmail and Google Contacts don't have person accounts, so new contacts created from those applications sync to Salesforce as contacts instead.

SEE ALSO:

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Google](#) (can be outdated or unavailable during release preview)

Give More Google Users Access to Attendees

Now reps who sync events from Salesforce to Google can add, remove, and edit attendees. Reps set up to sync events in any direction can see and sync attendees. This change applies to Lightning Experience and all versions of the Salesforce app. This feature requires Lightning Sync.

To let reps add and edit attendees:

- Set up reps to sync both ways or one way from Salesforce to Google.
- Add the Attendees field to the Event page layout.
- Reps have to create or edit the event from Lightning Experience, any Salesforce mobile app, or (if syncing both ways) from Google Calendar.

To let reps see attendees and let attendees sync between Salesforce and Google Calendar™:

- Set up reps to sync events in any direction between Salesforce and Google using Lightning Sync.
- Add the Attendees field to the Event page layout.
- Event organizers have to create and edit events from Lightning Experience, any Salesforce mobile app, or (if organizers are syncing both ways) from Google Calendar.

Setting up Lightning Sync limits some calendar functionality in Salesforce Classic. Check out “Considerations for Using Events and Calendars in Salesforce Classic” in Salesforce Help.

SEE ALSO:

[Spring '18 Features That Are Different or Not Available in the Salesforce App](#)

[Salesforce Help: Considerations for Using Events and Calendars in Salesforce Classic](#)(can be outdated or unavailable during release preview)

[Salesforce Help: Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App](#) (can be outdated or unavailable during release preview)

Manage Lightning for Gmail and Lightning Sync Settings Easily

Lightning for Gmail and Lightning Sync, together at last. We've combined setup for both features, making it more convenient for you to manage these products from the same place. This change applies to both Lightning Experience and Salesforce Classic.

To locate the new page, from Setup, enter *Lightning for Gmail and Sync* in the Quick Find box, and then select **Lightning for Gmail and Sync**.

We redesigned the page to help you walk through the setup process step by step. That way, if you have to change settings, you can reference supporting documentation less often.

And to help you with a smoother transition to Lightning Experience, the new design is available for customers on both Lightning Experience and Salesforce Classic. That means there's one streamlined experience, even if you have to hop between interfaces.

Microsoft® Integration: Flexible Record Creation, More Opportunity Insights, and More Sync Options

Get your reps working their Salesforce deals directly from Microsoft Outlook®. Lightning for Outlook provides reps flexibility to add records from emails that don't match a person in Salesforce. More Einstein insights and auto-completed record fields get reps working faster. Plus, help reps stay productive with more sync features, like person account sync, more sync directions, and more availability for event attendee sync. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

IN THIS SECTION:

[Lightning for Outlook: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence](#)

Create records and capture more information with ease from emails without a record match and leverage more artificial intelligence for leads in your emails with Einstein Opportunity Scoring and Opportunity Insights. This change applies to both Lightning Experience and Salesforce Classic.

[Lightning Sync for Microsoft® Exchange: More Sync Options, More Event Attendees Availability, and Redesigned Setup](#)

Get more flexibility to sync reps' items the way that's best for your business. Sync person accounts, choose from more sync direction options, and give more reps access to view, edit, and sync event attendees. Check out our new streamlined setup page, combined with Lightning for Outlook Settings. If you use both products, configure them from one convenient place. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Salesforce for Outlook: Bug Fixes Available](#)

Upgrade to Salesforce for Outlook v3.4.2 to get our latest bug fixes. Or better yet, if you meet the system requirements for our best Microsoft integration products to date, Lightning for Outlook and Lightning Sync, move your reps to those features now. That way, you can take advantage of the newest features and avoid manual upgrades in the future. These changes apply to both Lightning Experience and Salesforce Classic.

[Connect for Office: Update Required and End of Support for Microsoft® Word 2007](#)

Reps are required to upgrade to Connect for Office v1.8.1.7 to meet security certificate requirements after February 9, 2018. In addition, because Microsoft Word 2007 doesn't support the latest security certificates, the Microsoft Word add-in is no longer available for Word 2007 users. Therefore, Connect for Office can no longer support that environment. This change applies to Salesforce Classic only.

Lightning for Outlook: Flexible Record Creation, Unknown Email Recognition, and Einstein Intelligence

Create records and capture more information with ease from emails without a record match and leverage more artificial intelligence for leads in your emails with Einstein Opportunity Scoring and Opportunity Insights. This change applies to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Pin Lightning for Outlook Open When Composing Emails](#)

Reps can maintain their momentum while writing and working with emails by pinning Lightning for Outlook open. There's no need to open the feature over and over again to access customer data. The pin option is now available in Outlook 2016 on Windows that is installed using Click-to-Run with build 7900 or higher, with no additional setup required. This change applies to both Lightning Experience and Salesforce Classic.

[Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts](#)

When a rep receives an email from an address that doesn't match an email in a record in Salesforce, the rep can create a contact, lead, or person account (if Salesforce is set up with person accounts) directly from Lightning for Outlook. The flexibility to select the record type lets reps work how they want, or to align with your business processes for adding information to Salesforce. This change applies to both Lightning Experience and Salesforce Classic.

[Get More Context in Chatter Notifications](#)

When reps select Chatter notification emails in their inbox, Lightning for Outlook now shows the profile information for the user who made the post in Chatter. It also includes the record the comment was posted on. Lightning for Outlook is also smarter about matching email addresses to records in Salesforce, and no longer asks reps to create a user representing the Chatter email address (reply@chatter.salesforce.com). These changes apply to both Lightning Experience and Salesforce Classic.

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Your reps see lots of opportunities in a day. To help them prioritize their work, reps can see the opportunity score and the top insight in Lightning for Outlook. This change applies to Lightning Experience only.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Let Lightning for Outlook Do Your Typing](#)

Data entry isn't any fun. When reps create records from the Action Publisher in Lightning for Outlook, more content is pulled from the selected email and entered in Salesforce fields. For example, the email address is entered when adding a person account, and a matching account is suggested when adding a contact, along with other fields. This change applies to both Lightning Experience and Salesforce Classic.

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[Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts](#)

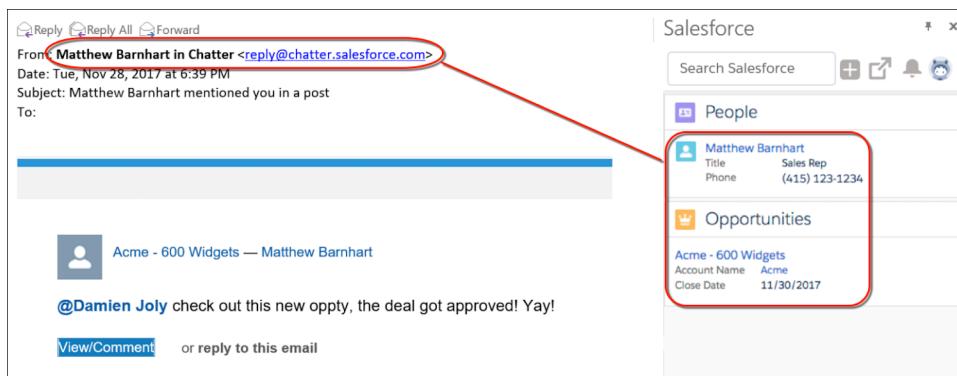
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SEE ALSO:

[Get More Context in Chatter Notifications](#)

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When reps select Chatter notification emails in their inbox, Lightning for Outlook now shows the profile information for the user who made the post in Chatter. It also includes the record the comment was posted on. Lightning for Outlook is also smarter about matching email addresses to records in Salesforce, and no longer asks reps to create a user representing the Chatter email address (reply@chatter.salesforce.com). These changes apply to both Lightning Experience and Salesforce Classic.



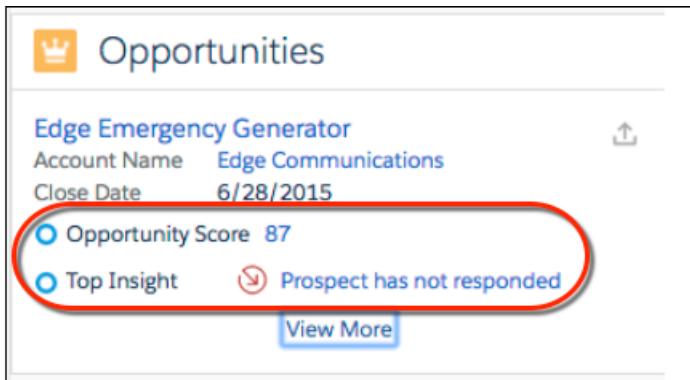
SEE ALSO:

[Turn Emails from Unknown Addresses into Contacts, Leads, or Person Accounts](#)

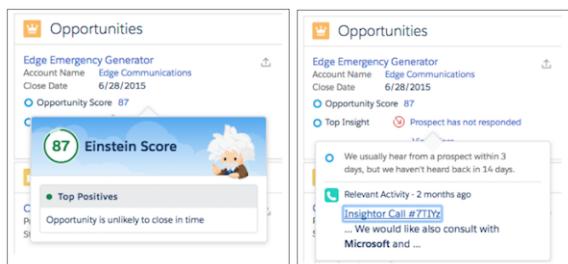
[Focus Work with Einstein Opportunity Scores and Insights in Microsoft® Outlook®](#)

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If you've enabled Einstein Opportunity Scoring, reps using Lightning for Outlook see a score that indicates how likely an opportunity is to close. If you've enabled Einstein Opportunity Insights, reps see the top opportunity insight, such as a key moment. This layer of intelligence helps reps focus their work on the right opportunities. More opportunity insights are available from View More, opportunity records, and the Home page.



Hovering over the score or insight shows details.



SEE ALSO:

[Einstein Opportunity Scoring: Artificial Intelligence for Opportunities \(Generally Available\)](#)

[Salesforce Help: Einstein Opportunity Insights \(can be outdated or unavailable during release preview\)](#)

Let Lightning for Outlook Do Your Typing

Data entry isn't any fun. When reps create records from the Action Publisher in Lightning for Outlook, more content is pulled from the selected email and entered in Salesforce fields. For example, the email address is entered when adding a person account, and a matching account is suggested when adding a contact, along with other fields. This change applies to both Lightning Experience and Salesforce Classic.

Lightning Sync for Microsoft® Exchange: More Sync Options, More Event Attendees Availability, and Redesigned Setup

Get more flexibility to sync reps' items the way that's best for your business. Sync person accounts, choose from more sync direction options, and give more reps access to view, edit, and sync event attendees. Check out our new streamlined setup page, combined with Lightning for Outlook Settings. If you use both products, configure them from one convenient place. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Sync Events Both Ways for Reps on Microsoft® Exchange 2013 and 2016](#)

Now you can set up reps on Exchange 2013 and 2016 to work with events from either Salesforce or their Microsoft calendars. Plus, you promote Salesforce adoption by making it easy for reps to work with events from Salesforce. This change applies to Lightning Experience and all versions of the Salesforce app. Events created or edited from Salesforce Classic don't sync with Exchange.

[Sync Events from Salesforce to Microsoft® Exchange Only](#)

Do your reps prefer to work with events from Salesforce, but you want to get those events into your company's Microsoft calendar, too? Now you can set up events to sync from Salesforce to Microsoft Exchange only. This change applies to Lightning Experience and all versions of the Salesforce app.

[Sync Person Accounts with Microsoft® Contacts](#)

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between their Salesforce and Microsoft contacts. That way, reps no longer have to maintain contact records in both systems. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Give More Microsoft® Exchange Users Access to Attendees](#)

Now reps on Microsoft® Exchange 2016 and 2013 and reps who sync events from Salesforce to Microsoft can add, remove, and edit attendees. Reps set up to sync events in any direction can see and sync attendees. This change applies to Lightning Experience and all versions of the Salesforce app. This feature requires Lightning Sync.

[Manage Lightning for Outlook and Lightning Sync Settings Easily](#)

Lightning for Outlook and Lightning Sync, together at last. We've combined setup for both features, making it more convenient for you to manage these products from the same place. This change applies to both Lightning Experience and Salesforce Classic.

Sync Events Both Ways for Reps on Microsoft® Exchange 2013 and 2016

Now you can set up reps on Exchange 2013 and 2016 to work with events from either Salesforce or their Microsoft calendars. Plus, you promote Salesforce adoption by making it easy for reps to work with events from Salesforce. This change applies to Lightning Experience and all versions of the Salesforce app. Events created or edited from Salesforce Classic don't sync with Exchange.

SEE ALSO:

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#) (can be outdated or unavailable during release preview)

Sync Events from Salesforce to Microsoft® Exchange Only

Do your reps prefer to work with events from Salesforce, but you want to get those events into your company's Microsoft calendar, too? Now you can set up events to sync from Salesforce to Microsoft Exchange only. This change applies to Lightning Experience and all versions of the Salesforce app.

SEE ALSO:

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#) (can be outdated or unavailable during release preview)

Sync Person Accounts with Microsoft® Contacts

To help reps who use person accounts work quickly and efficiently, keep data on customers and prospects in sync between their Salesforce and Microsoft contacts. That way, reps no longer have to maintain contact records in both systems. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Here's how it works. First, work with your Microsoft admin to set up Lightning Sync. If you've enabled person accounts in Salesforce, reps' person accounts sync to their Microsoft contacts.

Next, let your reps know how person accounts sync with Microsoft based on the sync directions you've selected. For example, if reps are syncing both ways or from Exchange to Salesforce, have reps create person accounts in Salesforce only. That's because Microsoft doesn't have person accounts, so new contacts created from applications like Outlook sync to Salesforce as contacts instead.

SEE ALSO:

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#) (can be outdated or unavailable during release preview)

Give More Microsoft® Exchange Users Access to Attendees

Now reps on Microsoft® Exchange 2016 and 2013 and reps who sync events from Salesforce to Microsoft can add, remove, and edit attendees. Reps set up to sync events in any direction can see and sync attendees. This change applies to Lightning Experience and all versions of the Salesforce app. This feature requires Lightning Sync.

To let reps add and edit attendees:

- Set up reps to sync both ways or from Salesforce to Exchange.
- Add the Attendees field to the Event page layout.
- Reps have to create or edit the event from Lightning Experience, any of the Salesforce mobile apps, or (if syncing both ways) from their Microsoft calendars.

To let reps see attendees and let attendees sync between Salesforce and Microsoft calendars:

- Set up reps to sync events in any direction between Salesforce and Exchange using Lightning Sync.
- Add the Attendees field to the Event page layout.
- Event organizers have to create and edit events from Lightning Experience, any of the Salesforce mobile apps, or (if organizers are syncing both ways) from their Microsoft calendars.

Setting up Lightning Sync limits some calendar functionality in Salesforce Classic. Check out " Considerations for Using Events and Calendars in Salesforce Classic" in Salesforce Help.

SEE ALSO:

[Spring '18 Features That Are Different or Not Available in the Salesforce App](#)

[Salesforce Help: Considerations for Using Events and Calendars in Salesforce Classic](#)(can be outdated or unavailable during release preview)

[Salesforce Help: Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App](#) (can be outdated or unavailable during release preview)

Manage Lightning for Outlook and Lightning Sync Settings Easily

Lightning for Outlook and Lightning Sync, together at last. We've combined setup for both features, making it more convenient for you to manage these products from the same place. This change applies to both Lightning Experience and Salesforce Classic.

To locate the new page, from Setup, enter *Lightning for Outlook and Sync* in the Quick Find box, and then select **Lightning for Outlook and Sync**.

We redesigned the page to help you walk through the setup process step by step. That way, if you have to change settings, you can reference supporting documentation less often.

And to help you with a smoother transition to Lightning Experience, the new design is available for customers on both Lightning Experience and Salesforce Classic.

Salesforce for Outlook: Bug Fixes Available

Upgrade to Salesforce for Outlook v3.4.2 to get our latest bug fixes. Or better yet, if you meet the system requirements for our best Microsoft integration products to date, Lightning for Outlook and Lightning Sync, move your reps to those features now. That way, you can take advantage of the newest features and avoid manual upgrades in the future. These changes apply to both Lightning Experience and Salesforce Classic.

See the Salesforce for Outlook release notes for more details on our latest version.

SEE ALSO:

[Salesforce for Outlook Release Notes](#) (can be outdated or unavailable during release preview)

[Trailhead: Integrate Outlook and Gmail with Salesforce](#)

[Salesforce Help: Lightning for Outlook System Requirements](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning Sync System Requirements](#) (can be outdated or unavailable during release preview)

EDITIONS

Available in: **All** Editions
except Essentials

Connect for Office: Update Required and End of Support for Microsoft® Word 2007

Reps are required to upgrade to Connect for Office v1.8.1.7 to meet security certificate requirements after February 9, 2018. In addition, because Microsoft Word 2007 doesn't support the latest security certificates, the Microsoft Word add-in is no longer available for Word 2007 users. Therefore, Connect for Office can no longer support that environment. This change applies to Salesforce Classic only.

Support for Connect for Office ended in 2017. If your reps can still use Connect for Office v1.8.1.6, it won't meet security certificate requirements after February 9, 2018. To avoid service disruption, we recommend that you upgrade reps or migrate them to an alternative product.

EDITIONS

Available in: **All** Editions
except Essentials

Sales reps can download Connect for Office v1.8.1.7 from their personal settings. Enter *Connect for Office* in the Quick Find box, and then select **Connect for Office**.

For suggestions on alternative products, check out our End of Support articles.

SEE ALSO:

[Knowledge Article: End of Support for Excel Add-In from Connect for Office in March 2017](#)

[Knowledge Article: End of Support for Word Add-In from Connect for Office and Standard Mail Merge in March 2017](#)

[Connect for Office Release Notes](#) (can be outdated or unavailable during release preview)

Salesforce CPQ and Billing: Quote and Payment Improvements

Deliver quotes, proposals, and contracts quickly and accurately. Automate your billing and payment process with flexible tools and terms. Salesforce CPQ and Billing offers an end-to-end solution for creating quotes, closing deals, settling invoices, and reporting revenue. Available in Lightning Experience and Salesforce Classic.



Note: You need to install Salesforce CPQ in order to use Salesforce Billing.

EDITIONS

Available for an extra cost in: **Professional, Enterprise, Unlimited, and Developer** Editions

IN THIS SECTION:

[Salesforce CPQ: Improved Line Selection and Contract Status Visibility](#)

Create and manage your quotes and orders with Salesforce CPQ. These changes apply to both Lightning Experience and Salesforce Classic.

[Salesforce Billing: Dynamic Invoice Plans, New Reporting Tools, Simplified Payments](#)

Create and automate your invoices, payments, and revenue recognition reports with Salesforce Billing. These changes apply to both Lightning Experience and Salesforce Classic.

Salesforce CPQ: Improved Line Selection and Contract Status Visibility

Create and manage your quotes and orders with Salesforce CPQ. These changes apply to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Choose Multiple Lines in Salesforce CPQ Visualforce Pages](#)

Your sales reps now have an easier way of selecting several options in certain Salesforce CPQ Visualforce pages. Users can shift-click to select several lines at the same time. This feature is new in both Lightning Experience and Salesforce Classic.

[Track Contracting Job Status](#)

You can now track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress. This feature is new in both Lightning Experience and Salesforce Classic.

[Other Changes in Salesforce CPQ](#)

Learn about other changes we've made to order product fields, line-level contracting, and CPQ browser performance.

Choose Multiple Lines in Salesforce CPQ Visualforce Pages

Your sales reps now have an easier way of selecting several options in certain Salesforce CPQ Visualforce pages. Users can shift-click to select several lines at the same time. This feature is new in both Lightning Experience and Salesforce Classic.

You can select only ungrouped lines on these pages.

- Add Products, for product lookup
- Add Products, for dynamic product lookup
- Select Assets, when you're upgrading an asset
- Select Contracts, when you're renewing subscriptions

Track Contracting Job Status

You can now track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress. This feature is new in both Lightning Experience and Salesforce Classic.

The spinner appears only when the contracting job is completed in the background.

Add this component to your existing order page layouts. First, find the page layouts for Orders.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**. Next, click **Order**, and then scroll to the **Page Layouts** section.
 - If you're using Salesforce Classic, from Setup, in the Quick Find box, enter *Orders*, and then select **Page Layouts**.
1. Next to CPQ Order Layout, click **Edit**.
 2. From the top panel, navigate to Visualforce Pages.
 3. Drag the **Section** label to an empty section.
 4. Name the new section *OrderContracting*.
 5. Deselect **Detail Page** and **Edit Page**. In layout, choose **1-Column**. Save your changes.
 6. From the Visualforce Pages menu, drag the OrderContracting label to the new section.
 7. Click the wrench icon on the OrderContracting section.
 8. To make sure that the page layout appears correctly, set **Width** to *100%* and **Height** to *22*. Deselect **Show scrollbars** and **Show labels**. Click **OK**.
 9. Save your changes.

Other Changes in Salesforce CPQ

Learn about other changes we've made to order product fields, line-level contracting, and CPQ browser performance.

IN THIS SECTION:

[Use the Prorate Multiplier for Order Products](#)

Salesforce CPQ order products now show the prorate multiplier field. This field inherits its value from the quote line and is used to calculate the order product's total price. This change applies to both Lightning Experience and Salesforce Classic.

[Line-Level Contracting on Related Orders Products Is Retired](#)

You can no longer create a contract from percent of total, covered, or bundle products at the order product level. Instead, create a contract with these objects through the order record. This change applies to both Lightning Experience and Salesforce Classic.

[Improved CPQ Browser Performance](#)

We've improved our front-end page structure to improve browser performance and loading times while using Salesforce CPQ. The page structure now uses Shadow Dom instead of Shady Dom.

Use the Prorate Multiplier for Order Products

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Improved CPQ Browser Performance

We've improved our front-end page structure to improve browser performance and loading times while using Salesforce CPQ. The page structure now uses Shadow Dom instead of Shady Dom.

Salesforce Billing: Dynamic Invoice Plans, New Reporting Tools, Simplified Payments

Create and automate your invoices, payments, and revenue recognition reports with Salesforce Billing. These changes apply to both Lightning Experience and Salesforce Classic.

 **Note:** You need to install Salesforce CPQ to use Salesforce Billing.

When installing the latest update to Salesforce Billing, we strongly recommend that you post or cancel all draft invoices before you begin the upgrade process. If you install Salesforce Billing and then post an invoice that was drafted before installation, you will experience errors with future invoices from related orders. These errors occur because Salesforce Billing Winter '18 (and later) updates order product dates related to the next billing date once an invoice is posted.

IN THIS SECTION:

[Customize Billing with Dynamic Invoice Plans](#)

Dynamic Invoice Plans offer more flexibility for how and when you bill customers. You can define amounts, dates, or project milestones that fall outside of the standard monthly, quarterly, and annual billing cycles. For example, you can bill 10% of an order product's total upon activation, 25% on the first delivery date, and the remainder after final delivery. This feature is new in both Lightning Experience and Salesforce Classic.

[Create Accurate Invoices for Canceled Orders](#)

Salesforce Billing has improved the invoicing process when an order is canceled. Customers now have more options for understanding the impact of a cancellation or change on the total billing amount, and can create more accurate invoices.

[Manage Tax for Your Credit Notes and Debit Notes](#)

Our tax calculation process lets you estimate tax for your credit notes and debit notes before you apply it. If you need to change fields that factor into tax calculation, you can do so before you commit tax to the credit note or debit note record.

[Use New Reports to View Account Status](#)

Useful reporting tools and out-of-the-box templates show snapshots of your accounts and transactions, and provide examples of how Salesforce Billing can help you work better. These changes apply to both Lightning Experience and Salesforce Classic.

[Manage Payments Seamlessly in the New Payment Center](#)

The updated Payment Center offers a more intuitive and faster process for settling accounts. Customers have more flexibility for paying all or part of a single invoice or multiple invoices. In addition to making payments, you can now add or change credit card or ACH details in a simplified user interface. This feature is new in both Lightning Experience and Salesforce Classic.

[Add Flexibility with Prerated Usage for Order Products](#)

If you have usage ratings that are defined by another source, or charges not covered by standard usage ratings, you can include them as prerated usage. This feature is new in both Lightning Experience and Salesforce Classic.

[Manage Outstanding Debt with Account Balance Snapshots](#)

Quickly view the status of your invoices and how late an expected payment is for an account. The new Account Balance Snapshot shows a summary of the total original invoice, payments or credits made so far, and outstanding debt. You can set it up to show overdue invoices of one day, 30 days, 60 days, 120 days, and so on. Configure Salesforce Billing to generate these snapshots on a regular basis to help you identify and report on bad debt.

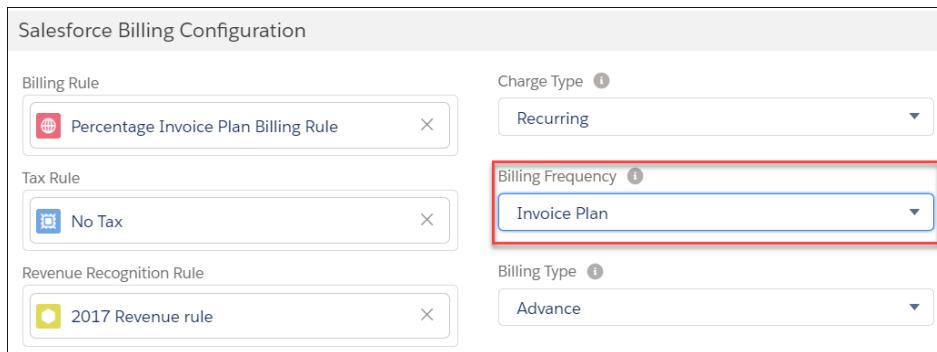
[Clean Up Unsuccessful Invoice Runs](#)

There's an automated way to reset invoices, order products, or usage summaries that are part of a failed invoice run. Choose the new **Clean Up** option on the Invoice Run page to correct any system errors and restart the process. Your data can then be picked up by another invoice run. This change applies to both Lightning Experience and Salesforce Classic.

Customize Billing with Dynamic Invoice Plans

Dynamic Invoice Plans offer more flexibility for how and when you bill customers. You can define amounts, dates, or project milestones that fall outside of the standard monthly, quarterly, and annual billing cycles. For example, you can bill 10% of an order product's total upon activation, 25% on the first delivery date, and the remainder after final delivery. This feature is new in both Lightning Experience and Salesforce Classic.

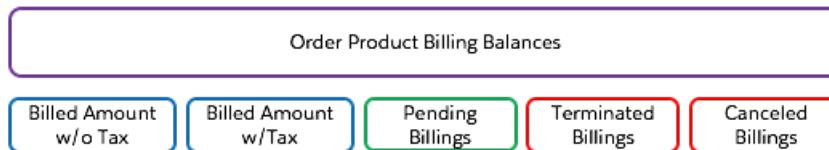
When you're configuring the billing treatment for an order product, under **Billing Frequency** select the new field **Invoice Plan** from the dropdown menu. You can then create custom invoice lines to perform actions at different times using different amounts.



Create Accurate Invoices for Canceled Orders

Salesforce Billing has improved the invoicing process when an order is canceled. Customers now have more options for understanding the impact of a cancellation or change on the total billing amount, and can create more accurate invoices.

New fields showing pending, terminated, and canceled amounts provide greater visibility into billing status when an order product is changed, swapped, or canceled. Understanding these calculations means better accounting for you, and more accurate invoices for your customers.



To use these new features, set up a Cancellation Rule in the Billing Treatment record.

The screenshot shows a Salesforce page for a "Billing Treatment" record named "10-20-Remainder". The page has a blue header with the title and a "Billing Treatment" icon. Below the header is a navigation bar with "RELATED" and "DETAILS" tabs, where "DETAILS" is underlined. The main area contains several fields:

- Active:**
- Billing Treatment Name:** **10-20-Remainder**
- Notes:** (empty)
- Billing Finance Book:** **Forlo Motors**
- Invoice Plan:** **10%-20%-Remainder**
- Cancellation Rule:** **LIFO based on Termination Date** (This field is circled in red)

Manage Tax for Your Credit Notes and Debit Notes

Our tax calculation process lets you estimate tax for your credit notes and debit notes before you apply it. If you need to change fields that factor into tax calculation, you can do so before you commit tax to the credit note or debit note record.

To calculate or estimate tax, make sure that your credit note or debit note has the following setup.

- A tax address on the note or one of its lines
- An effective tax date
- Each line has **Calculate Tax?** selected
- Each line has the Taxable (Yes/No) field set to yes
- Each line has a tax treatment

1. Click **Estimate Tax** on a draft credit note or debit note.

Salesforce Billing calls your tax engine to provide an estimated value for the Tax field in each of your note's lines. The sum of the line tax is displayed in your note's Tax field.

2. Review the value and adjust your tax settings as needed. Click **Estimate Tax** when you're ready to update your Tax fields with new values.

3. If you want to remove estimated tax from your note altogether, click **Cancel Tax**.

Salesforce Billing calls your tax engine to cancel your estimated tax. The Tax fields and Total Amount (With Tax) fields on your credit note lines and debit note lines change their values to null.

4. When you're ready to commit the tax and post the credit note, click **Apply Tax**.

Use New Reports to View Account Status

Useful reporting tools and out-of-the-box templates show snapshots of your accounts and transactions, and provide examples of how Salesforce Billing can help you work better. These changes apply to both Lightning Experience and Salesforce Classic.

New reports include:

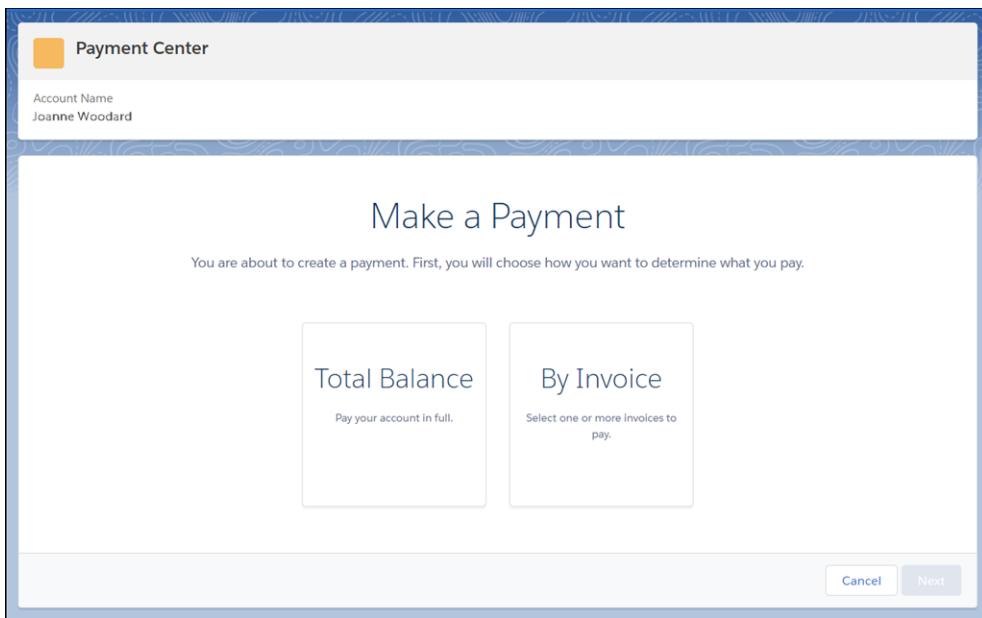
- Open Invoices
- Invoicing by Product
- Invoicing by Legal Entity
- Invoicing by Charge Type
- Invoices with Details by Account
- Invoices by Industry
- Invoices with Details
- Invoice Totals by Account
- Invoice Totals
- Errored Invoices
- Canceled Invoices
- Canceled Invoice Details
- Credit Note Totals
- Canceled Credit Notes

Reports are available to use with standard Salesforce Billing fields and the Reports object. You can use them straight out of the box or modify an existing report to better reflect your business goals.

Manage Payments Seamlessly in the New Payment Center

The updated Payment Center offers a more intuitive and faster process for settling accounts. Customers have more flexibility for paying all or part of a single invoice or multiple invoices. In addition to making payments, you can now add or change credit card or ACH details in a simplified user interface. This feature is new in both Lightning Experience and Salesforce Classic.

The new Payment Center is linked from both the Accounts and Invoices objects.



Add Flexibility with Prerated Usage for Order Products

If you have usage ratings that are defined by another source, or charges not covered by standard usage ratings, you can include them as prerated usage. This feature is new in both Lightning Experience and Salesforce Classic.

Typically, when a user uploads usage for an order product, subscription, or service, Salesforce Billing configures the invoice based on the order product or price schedule. That works great for most cases, but sometimes customers want to add a specific amount to the usage record rather than relying on the price schedule. Examples include pass-through postage charges for one-time shipping costs, bill-through expenses, or services with their own rating system in place.

To upload prerated usage, on the usage record, select **Prerated Quantity** or **Prerated Amount**. Salesforce Billing doesn't apply a rating to that usage and uses the amount or quantity you provided instead. The prerated amount is then used when calculating total unbilled charges for your subscription or service. Both rated and prerated totals can exist side-by-side in a usage summary, allowing you to see all charges related to an account and bill customers accurately.

 **Note:** Prerated usage is not available for tiered pricing plans.

Manage Outstanding Debt with Account Balance Snapshots

Quickly view the status of your invoices and how late an expected payment is for an account. The new Account Balance Snapshot shows a summary of the total original invoice, payments or credits made so far, and outstanding debt. You can set it up to show overdue invoices of one day, 30 days, 60 days, 120 days, and so on. Configure Salesforce Billing to generate these snapshots on a regular basis to help you identify and report on bad debt.

The Account Balance Snapshot contains up to 10 preconfigured aging buckets, each of which captures invoice debt within a certain time period. For example, one aging bucket could show the total outstanding debt for invoices that are 0–30 days late. Another bucket on the same snapshot could show debt for invoices that are 31–60 days late. This view is a quick way to assess accounts that are repeatedly more than a month late, for example. Customize your balance snapshots to run daily, on a specific day of the week or month, at a specific time, and at a desired frequency.

 **Note:** If an account uses more than one type of currency, create a separate account balance snapshot for each currency.

Clean Up Unsuccessful Invoice Runs

There's an automated way to reset invoices, order products, or usage summaries that are part of a failed invoice run. Choose the new **Clean Up** option on the Invoice Run page to correct any system errors and restart the process. Your data can then be picked up by another invoice run. This change applies to both Lightning Experience and Salesforce Classic.

While most invoice runs complete successfully, on rare occasions they encounter problems which are out of your control. An invoice run can fail due to permission issues, connectivity, or system failures. When errors occur, the order products and usage summaries in the run aren't processed. To make sure that these charges are picked up for another invoice run, select **Clean Up** from the Invoice Run Detail page. **Clean Up** does the following, depending on the type of record:

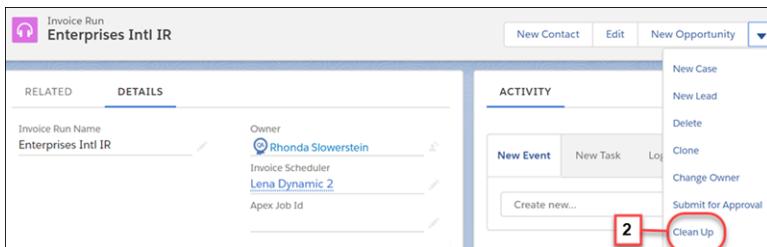
- Changes the Invoice Status from Error, Initiated, or Draft, to **Canceled**.
- Changes the Order Product Status from Error or In Progress back to **Pending Billing**.
- Changes the Usage Summary status from Error or In Progress back to **Pending Billing**.

These actions ensure that all the data from a failed invoice run is added to a new invoice run and processed successfully by future runs.

In Salesforce Classic, add **Clean Up** as a custom button to the Invoice Run page (1).



In Lightning Experience, it appears in the dropdown menu on the Invoice Run page (2).



Pardot: Campaign Alignment (Beta), Campaign Engagement (Beta), Lead–Account Matching, Support for Japanese

Sync Pardot and Salesforce campaign records, see how campaign members are engaging with campaigns, match leads to accounts, and use Pardot in Japanese. These changes apply to Lightning Experience only.

Connect Your Pardot Campaigns to Salesforce Campaigns (Beta)

Let your marketing department use the features of both Pardot and Salesforce with a single set of campaign records. When campaigns are connected, marketers can track campaign influence and view engagement history all on the same record in Salesforce.

See Marketing Asset Performance Directly on Campaigns (Beta)

When they connect their Pardot and Salesforce campaigns, your marketing department can see exactly how much engagement their campaigns are generating, right in Salesforce. Add the Engagement Metrics component, engagement history fields, and report charts to campaign page layouts to show marketers how much activity their emails and forms are generating. Add the Engagement History related list to leads and contacts to see how they have engaged.

Connect the Dots Between Leads and Accounts

If you use Pardot, help your teams practice account-based marketing by using your Salesforce data in a new way. In Lightning App Builder, add the Matched Leads component to your business account pages to show leads matched to an account, with the best

matches first. Sales teams can convert leads without leaving the account. By reducing redundant data, the Matched Leads component helps you work toward complying with data protection and privacy regulations.

Pardot Available in Japanese

Pardot has been localized for Japan and is generally available to all customers.

Secure Tracker Domains with SSL

Starting in Spring '18, you can SSL-secure your Pardot tracker domains and serve Pardot content over HTTPS. Previously, you had to use Pardot's go.pardot.com domain to secure your marketing assets, instead of using your own branded, memorable tracker domain. Now you can request an SSL certificate for any validated tracker domain in your account on the Pardot Domain Management page.

Sync Users from Salesforce to Pardot

Pardot admins can automatically sync users in their connected Salesforce org to Pardot. When Salesforce User Sync is enabled, Pardot admins choose which Salesforce user profiles to sync. Then when users are added, removed, or edited, the changes sync to Pardot within minutes.

Pardot Available in Japanese

Pardot has been localized for Japan and is generally available to all customers.

Editions

Available in: **All** Pardot Editions

Secure Tracker Domains with SSL

Starting in Spring '18, you can SSL-secure your Pardot tracker domains and serve Pardot content over HTTPS. Previously, you had to use Pardot's go.pardot.com domain to secure your marketing assets, instead of using your own branded, memorable tracker domain. Now you can request an SSL certificate for any validated tracker domain in your account on the Pardot Domain Management page.

Sync Users from Salesforce to Pardot

Pardot admins can automatically sync users in their connected Salesforce org to Pardot. When Salesforce User Sync is enabled, Pardot admins choose which Salesforce user profiles to sync. Then when users are added, removed, or edited, the changes sync to Pardot within minutes.

Before enabling Salesforce User Sync, review the implementation guide to understand the changes and implications. See [Salesforce User Sync Implementation Guide](#).

Editions

Available in: **All** Pardot Editions

Other Changes in the Sales Cloud

We've added adjustable column widths in the forecasts grid and a new permission required to access the forecasts page in Lightning Experience. We removed data for contacts in the UK and Ireland from the Data.com Connect database and we added zero quantity order lines to order products.

IN THIS SECTION:

[Forecasts Grid Column Widths Are Adjustable in Lightning Experience](#)

Forecasts users can now adjust the column width in the forecasts grid in Lightning Experience, just like in Salesforce Classic.

New Permission Required to Access the Forecasts Page in Lightning Experience

Users now need the View Roles and Role Hierarchy permission to access the forecasts page in Lightning Experience. This permission is assigned to all forecast users by default.

UK and Ireland Contact Data Removed from Data.com Connect

To support your efforts to comply with data protection and privacy regulations, such as the General Data Privacy Regulation (GDPR), we removed data for contacts in the UK and Ireland from the Data.com Connect contact database. Contacts that were previously matched using Data.com Clean or Data.com Prospector now have a Clean status of Not Found. If you receive requests related to data protection and privacy, consider directing requesters to [Are You in Data.com Connect?](#) If they're in the database, they can use the opt-out form to remove themselves.

Zero Quantity Order Lines Allowed on Order Products

Set your order preferences to create order products with a quantity of zero. This feature is new in both Lightning Experience and Salesforce Classic.

Forecasts Grid Column Widths Are Adjustable in Lightning Experience

Forecasts users can now adjust the column width in the forecasts grid in Lightning Experience, just like in Salesforce Classic.

EDITIONS

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

New Permission Required to Access the Forecasts Page in Lightning Experience

Users now need the View Roles and Role Hierarchy permission to access the forecasts page in Lightning Experience. This permission is assigned to all forecast users by default.

EDITIONS

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

[Control Access to Roles and Role Hierarchy with a New Permission](#)

[Salesforce Help: Enable Users in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

UK and Ireland Contact Data Removed from Data.com Connect

To support your efforts to comply with data protection and privacy regulations, such as the General Data Privacy Regulation (GDPR), we removed data for contacts in the UK and Ireland from the Data.com Connect contact database. Contacts that were previously matched using Data.com Clean or Data.com Prospector now have a Clean status of Not Found. If you receive requests related to data protection and privacy, consider directing requesters to [Are You in Data.com Connect?](#) If they're in the database, they can use the opt-out form to remove themselves.

Zero Quantity Order Lines Allowed on Order Products

Set your order preferences to create order products with a quantity of zero. This feature is new in both Lightning Experience and Salesforce Classic.

Before you can enable this setting, orders must be enabled for your Salesforce org. From Setup, in the Quick Find box, enter *Order Settings*, and then select **Enable Zero Quantity**. Save your changes. From there, you can create zero quantity orders just like other orders.

EDITIONS

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Marketing: Content Sharing, Enhanced SMS and Push Messages, and Other Features

Build a single view of customer-leveraging data from any source. Plan and optimize unique customer journeys based on your company's business objectives. And deliver personalized content across every channel and device at the right time. Marketing Cloud helps marketers measure the impact of each interaction on your business to optimize your approach and deliver better results.

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

- [April 2018 Release](#)
- [January 2018 Release](#)
- [October 2017 Release](#)
- [August 2017 Release](#)
- [June 2017 Release](#)

SEE ALSO:

[Marketing Cloud Overview](#)

[Salesforce Marketing Cloud Facebook Page](#)

Service: Knowledge Article Sharing, Return Orders, and Mass Quick Actions for Cases

Build a stellar customer service experience with Service Cloud Essentials, a new edition of Service Cloud tailored to the needs of small businesses. Boost your Knowledge efforts with export functions, article sharing, and translation approval processes, and incorporate the Knowledge component into your Live Agent implementation. Track field service product returns and repairs with the help of return orders, get up to speed quickly with a new guided setup, and customize the Field Service Lightning mobile app experience by user profile. Enjoy mass quick actions for cases and leads, macro support for all objects, and a more powerful Snap-ins SDK. Finally, take advantage of a host of improvements to Service Cloud in Lightning Experience, including quick text support, a dressed-up social conversation sidebar, and a richer Live Agent experience.

EDITIONS

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Service Cloud Essentials: Customer Service for Small-But-Mighty Businesses](#)

Service Cloud Essentials is designed for small businesses looking to build a CRM-based customer service experience. You can use its suite of powerful features to launch a customer service solution that meets your immediate needs and scales with your company's growth. Service Cloud Essentials is available in Lightning Experience only.

[Knowledge: Component Enhancements and More Classic Features Added to Lightning Knowledge](#)

Lightning Knowledge has added features that were previously only available in Classic Knowledge. Now you can insert article content into case emails, submit article drafts for approval actions, and assign article actions. In addition, agents now have instant access to the Knowledge component when fielding Live Agent chats.

[Field Service: Return Orders and Spiffier Service Reports](#)

Efficiently track items returned by customers or field employees with the help of return orders, which show the reason for the return, processing instructions, and the repayment method. Conclude your field service jobs on a high note with improved service reports, which now come with related list filtering, page numbers, and new Lightning Experience capabilities.

[Agent Productivity: Quick Text and Macros for All](#)

Now macros and quick text can work together to make your day easier. Quick text is available in Lightning Experience and you can use macros on most standard and custom objects. These changes apply to Lightning Experience only.

[Cases: Mass Quick Actions, Cases for Path, and Email Enhancements](#)

We are really opening up the capability of Quick Actions where you can run actions on multiple records of Case, Leads, or Custom Objects. Mass quick actions for creating and updating records allows agents to be more efficient. Use Path for Cases to determine and customize the Case stages that are important to your organization and provide guidance for Agent success. Enhancements around email that continue to push agent productivity to the forefront.

[Service Console: Pinned Region Pages, Quick Text, and Mass Quick Actions](#)

Add pinned regions to let your agents keep displaying case record information while viewing subtabs. Agents can now use quick text, perform mass actions on their cases, and much more. These changes apply to Lightning Experience only.

[Live Agent: Quick Text and Knowledge Support in Lightning Experience](#)

Agents can quickly insert standardized responses with quick text and look up knowledge articles while chatting in Lightning Experience. Agents also can delete Waiting transcripts in both Salesforce Classic and Lightning Experience. Seamless releases ensure a better experience for chats that are in progress when a release is delivered.

[Omni-Channel: Skills-Based Routing and More to Love in Lightning Experience](#)

Route work to agents using skills instead of queues with skills-based routing (beta). Omni-Channel Supervisor is generally available in Lightning Experience, and External Routing (beta) is available in Lightning Experience. The console methods for Lightning Experience that we introduced in Winter '18 are generally available. The Omni-Channel events that you love in Salesforce Classic are now available in Lightning Experience. We also raised our routing limits and added functionality with workflows and triggers.

[Snap-Ins for Web: Pre-Chat Lightning Components, Direct-to-Button Routing, Automated Invitations, and More](#)

Customize the pre-chat form and use direct-to-button routing, automated invitations, and sensitive data rules. If you use the Snap-ins Chat component in your community or Lightning Out (beta) to log in your customers, you can set some pre-chat fields to fill for them when they request a chat. There are some additional changes to Snap-ins setup and the code snippet. Upgrade your existing code snippets to version 4.0 to use the newest features.

[Snap-Ins for Mobile Apps: SDK Enhancements](#)

We're hard at work improving the Snap-ins SDKs for Android and iOS. Map fields in your app's pre-chat form to fields in a record in your org. Customize Knowledge articles with your own JavaScript or CSS. We also support the latest hardware and software: iPhone X, iOS 11, and Android O.

[Entitlement Management: View Work Order Milestones in Lightning Experience](#)

Agents can now see past, current, and upcoming milestones on work orders in Lightning Experience. View countdowns on remaining milestones and mark milestones complete in the redesigned milestone tracker.

[Social Customer Service: Learn More About Your Customers with the Conversations Component](#)

Social Customer Service offers even more customer information in the conversations component! Improvements like customer sentiment and social media status (to name a few) offer more customer visibility than ever before. Other updates include a collapsible sidebar, code-free business rules, automated social case routing, and Apex threading modifications..

[CTI: The VF Component support:clickToDial Now Works in Lightning Experience](#)

If you have Visualforce embedded in your app with legacy click-to-dial, you can add items such as clickable phone numbers. Helpful with your existing CTI implementations.

[Service Cloud Mobile \(Pilot\)](#)

All the case management features you love from Service Cloud are coming to your mobile device! Manage case lists and queues. Update, edit, and collaborate on cases. Communicate via email, Facebook, and Twitter. Execute bulk actions. Search contact and account details. Available for both Android and iOS mobile devices.

[Other Changes in Service Cloud](#)

Learn about other changes we've made in the Service Cloud.

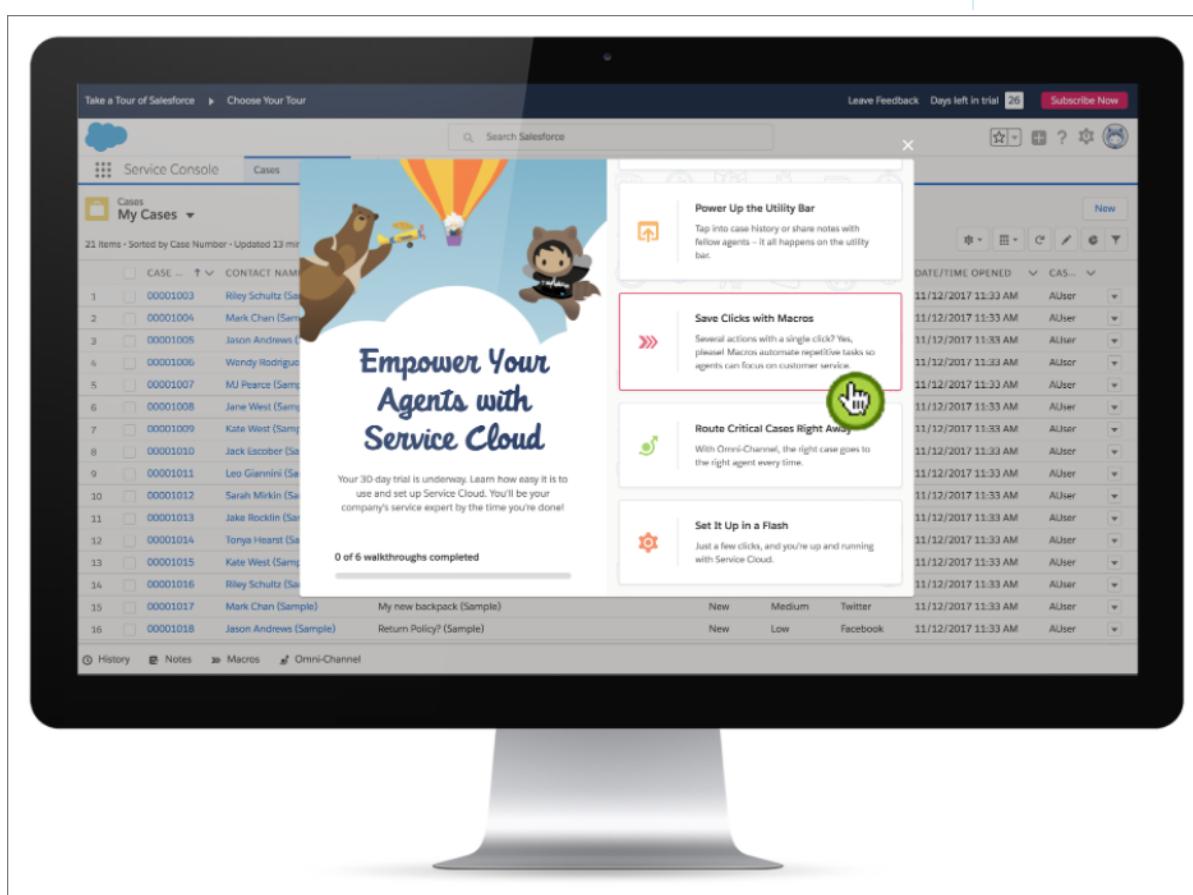
Service Cloud Essentials: Customer Service for Small-But-Mighty Businesses

Service Cloud Essentials is designed for small businesses looking to build a CRM-based customer service experience. You can use its suite of powerful features to launch a customer service solution that meets your immediate needs and scales with your company's growth. Service Cloud Essentials is available in Lightning Experience only.

Check it out with a [30-day free trial](#) of Service Cloud.

EDITIONS

Available in: **Essentials**
Edition



Knowledge: Component Enhancements and More Classic Features Added to Lightning Knowledge

Lightning Knowledge has added features that were previously only available in Classic Knowledge. Now you can insert article content into case emails, submit article drafts for approval actions, and assign article actions. In addition, agents now have instant access to the Knowledge component when fielding Live Agent chats.

IN THIS SECTION:

[Insert Article Content into Case Emails](#)

No cutting. No pasting. No retyping. Agents can insert article content directly into case emails, quickly answering customer questions. This change applies to Lightning Experience.

[Set Up Draft Approval in Lightning](#)

As in Classic Knowledge, authors can now submit draft articles and route them for approval. Admins can design a custom approval process based on their organization's needs, even set up article routing with auto-approval conditions. This change applies to Lightning Experience.

[Reassign Drafts to New Assignees](#)

Previously, when a draft article was assigned to someone who left the company or went on vacation, the article was stuck in draft mode and never published—not anymore. Managers and authors can reassign drafts if the owner can't finish the article (or wanders off to Bora Bora). This change applies to Lightning Experience only.

[Give Live Agent Users Access to Knowledge](#)

Problem: Agents need quick answers for their chat cases. Solution: Live Agent users can search the company's knowledge base, right in the Knowledge component, while chatting with their customers. Agents can even search Knowledge when there isn't an open case. This change applies to Lightning Experience only.

[Import Translation Files with Ease](#)

Translation managers, rejoice! You can import translated files directly into draft translation records. Translated files are then added to Files and displayed in the Related List of the Knowledge Article. This change applies to Lightning Experience only.

Insert Article Content into Case Emails

No cutting. No pasting. No retyping. Agents can insert article content directly into case emails, quickly answering customer questions. This change applies to Lightning Experience.

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

Salesforce Knowledge is available in: **Performance** and **Developer** Editions and the **Unlimited** Edition with the Service Cloud

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Give Live Agent Users Access to Knowledge

Problem: Agents need quick answers for their chat cases. Solution: Live Agent users can search the company's knowledge base, right in the Knowledge component, while chatting with their customers. Agents can even search Knowledge when there isn't an open case. This change applies to Lightning Experience only.

Import Translation Files with Ease

Translation managers, rejoice! You can import translated files directly into draft translation records. Translated files are then added to Files and displayed in the Related List of the Knowledge Article. This change applies to Lightning Experience only.

Field Service: Return Orders and Spiffier Service Reports

Efficiently track items returned by customers or field employees with the help of return orders, which show the reason for the return, processing instructions, and the repayment method. Conclude your field service jobs on a high note with improved service reports, which now come with related list filtering, page numbers, and new Lightning Experience capabilities.

IN THIS SECTION:

[Track Product and Inventory Returns with Return Orders](#)

If the shoe (or solar panel) doesn't fit, we've got you covered! Return orders make it simple to facilitate the return of items you sold to customers or supplied to technicians. This change applies to both Lightning Experience and Salesforce Classic.

[Filter Related Lists on Service Reports \(Beta\)](#)

Limit the records that appear in related lists on service reports by adding a filter to any service report template. For example, set up a filter so the Work Order Line Items related list on work order service reports shows only completed line items. This change applies to both Lightning Experience and Salesforce Classic.

[View, Email, and Delete Service Reports in Lightning Experience](#)

Enjoy a slick new preview screen with email and delete actions in the Service Reports related list. This change applies to Lightning Experience only.

[Add Page Numbers to Service Reports](#)

Get on the same page as your customers with the help of a handy new setting on service report templates. This change applies to both Lightning Experience and Salesforce Classic.

[View and Manage Service Crews in the Salesforce App](#)

Service crews and service crew members are now supported in the Salesforce app. View crew details, add and remove crew members, and review members' skills. This change applies to all versions of the Salesforce app.

[Create Service Resources for Omni-Channel Support Agents \(Beta\)](#)

There's a new type of service resource in town. Create service resources of type Agent to improve case routing for agents using Omni-Channel skills-based routing (Beta). This change applies to both Lightning Experience and Salesforce Classic.

[Field Service Managed Package: Service Crews and Scheduling and efficiency, Oh My](#)

Easily set up and maintain field service objects with the new guided setup. Schedule service crews with the managed package. Verify map coordinates before they're deployed, and measure your mobile workforce efficiency.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning standard features and managed package are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

[Field Service for Mobile: Profile-Based Settings, Flow Enhancements, and the iOS App Turns 4.0](#)

Assign unique sets of Field Service Mobile settings to user profiles for both iOS and Android to meet each user's needs. In the iOS app, technicians can consume products from multiple locations (beta) and admins can now control who is allowed to edit their inventory of product items. Search layouts can be used for lookup fields and resource absences in the iOS app, giving you greater control of the user interface. Finally, we made some improvements to flows in both iOS and Android.

Track Product and Inventory Returns with Return Orders

If the shoe (or solar panel) doesn't fit, we've got you covered! Return orders make it simple to facilitate the return of items you sold to customers or supplied to technicians. This change applies to both Lightning Experience and Salesforce Classic.

You can use return orders to track customer returns, customer repairs, or the return of inventory from a technician's van stock to a warehouse or supplier. Customers can initiate a return from a community, or agents can create return orders in response to a customer call or technician request.

Return order line items allow you to add details about the items being returned. Each line item must list one or more of the following, which represents the items being returned: product, product item, asset, product request line item, order product. You can also associate a return order with a product request, case, account, contact, or order. This versatility lets you use return orders to track a wide range of scenarios.

Let's review three ways that Rockin' Robotics, a hypothetical company that sells robotic arms, can use return orders in its field service operation.

Technician Returns

To prepare for an on-site installation appointment, a Rockin' Robotics technician creates a product request for three large hydraulic arms. Upon receiving the products and arriving at the site, the technician learns that only two arms are needed. To return the unwanted arm to the main warehouse, the technician creates a return order with one line item whose Product Item field lists the arm. The inventory manager then creates a product transfer to track the return of the arm to the warehouse. After the arm is returned to the warehouse, the warehouse product item can be updated to reflect the change in inventory numbers.

Field	Value
Return Order Line Item Number	ROLI-0001
Product	PI-0001
Product Item	PI-0001
Asset	
Quantity Returned	1.00
Return Order	RO-0003
Product Request Line Item	PRLI-0001
Reason For Return	Wrong Quantity
Processing Plan	Restock
Repayment Method	

Customer Returns

A Rockin' Robotics customer purchased a small hydraulic arm by mistake. To return it, the customer creates a case from the customer community. The assigned agent creates a return order for the customer that lists the related order and order product. The customer can then ship the product using the shipping information provided by the agent. When the product arrives, the inventory manager

decides to restock it. The manager updates the quantity on the appropriate product item to indicate that the warehouse has gained an additional small hydraulic arm.

Customer Repairs

A Rockin' Robotics customer wants to retrofit its eight-year-old hydraulic arm with the current technology. They call Rockin' Robotics and the support agent creates a work order to have the arm retrofitted. The agent then associates the work order with a return order that tracks the return of the arm to the Rockin' Robotics workshop. After the arm is retrofitted, the work order is marked complete. A product transfer and shipment are then created to track the return of the arm from the workshop to the customer.

Because return orders can be associated with a variety of objects, you decide how best to incorporate them into your field service processes. For example, to minimize processing time, you might decide not to associate return orders with product transfers.

Return orders are available in Lightning Experience, Salesforce Classic, the Salesforce app, the Field Service Lightning mobile app for Android and iOS, and communities built using Salesforce Tabs + Visualforce.

View and manage return orders from the Return Orders tab in Salesforce. Return orders can also be incorporated into multiple page layouts:

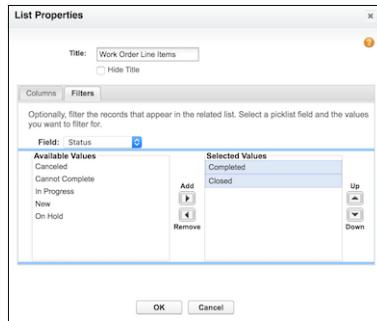
- The Return Orders related list is available for accounts, contacts, product requests, cases, orders, and locations.
- The Return Order Line Items related list is available for product items, return orders, locations, products, assets, order products, and product request line items.
- The Return Order and Return Order Line Item fields are available on work order, work order line item, and product transfer page layouts.

Filter Related Lists on Service Reports (Beta)

Limit the records that appear in related lists on service reports by adding a filter to any service report template. For example, set up a filter so the Work Order Line Items related list on work order service reports shows only completed line items. This change applies to both Lightning Experience and Salesforce Classic.

Related list filters on service report templates work just like regular Salesforce list view filters. Here's how to set up a filter.

1. From Setup, enter *Service Report Templates* in the Quick Find box, then select **Service Report Templates**.
2. Click **Edit** next to the template that needs a filter. If the list isn't added to the layout yet, drag a **List** tile onto the layout, and select the object and fields to display.
3. In the Related Templates field at the top of the editor, select a sub-template. For example, to apply the filter to all work order service reports using the template, select **Work Order**.
4. Find the related list you want to filter, and click the wrench icon to view its properties.
5. Select the Filters tab.
6. Select a picklist field to define the filter.
7. Use the arrow buttons to select picklist values. Only records that list a selected value in the filter field will appear in service reports that use the template.
8. Click **OK**.
9. If desired, repeat the previous steps for other sub-templates.
10. Save your changes.



Now, the filter you created will be reflected in records that use the service report template.

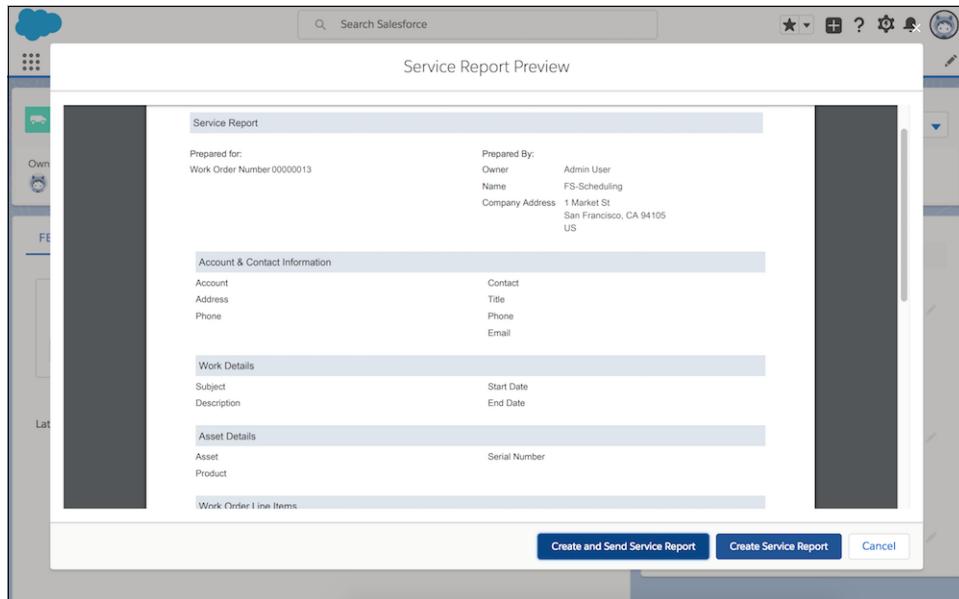
When using related list filtering on service reports, keep the following in mind.

- You can create only one filter per related list.
- Filtering is available only on picklist fields.
- You can't filter the Status field on contract line items.
- Related list filtering isn't supported on Internet Explorer 8.

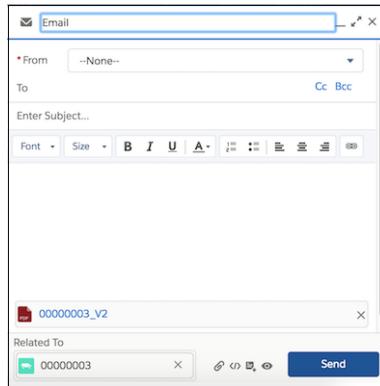
View, Email, and Delete Service Reports in Lightning Experience

Enjoy a slick new preview screen with email and delete actions in the Service Reports related list. This change applies to Lightning Experience only.

Previously, service reports couldn't be viewed in Lightning Experience. Now, clicking **Create Service Report** on a work order, work order line item, or service appointment reveals a preview of the report.



Click **Create Service Report** to generate the PDF report, or click **Create and Send Service Report** to generate the report and open the email editor. The report is already attached to the draft email.



The Service Reports related list on a record shows all generated service reports. From the related list, you can:

- View a service report by clicking its name
- Delete a service report by selecting **Delete** in the action dropdown menu
- Email a service report by selecting **Email Service Report** in the action dropdown menu

Service Reports (2)		
SERVICE REPORT NAME	CREATED BY	CREATED DATE
00000013_V2	AUser	11/13/2017 2:46 PM
00000013_V1	AUser	11/13/2017 1:25 PM
View All		

Note: To email a service report, you need the Send Email user permission and Edit permission on the parent record. To delete a service report, you need Delete permission on the parent record.

Add Page Numbers to Service Reports

Get on the same page as your customers with the help of a handy new setting on service report templates. This change applies to both Lightning Experience and Salesforce Classic.

Here's how to switch on page numbers for a service report template.

- From Setup, enter *Service Report Templates* in the Quick Find box, then select **Service Report Templates**.
- Click **Edit** next to the template that needs page numbers.
- In the Related Templates field at the top of the editor, select a sub-template. For example, to add page numbers to all work order service reports using the template, select **Work Order**.
- Click the wrench icon in the Footer section to view the section properties.
- Select **Show page numbers in footer** and click **OK**.
- If desired, repeat the previous steps for other sub-templates.
- Save your changes.



When this setting is selected, service reports include a page number in the bottom right corner of each page.



Note: The word "Page" appears in the default language of the Salesforce org. The page number format can't be customized.

View and Manage Service Crews in the Salesforce App

Service crews and service crew members are now supported in the Salesforce app. View crew details, add and remove crew members, and review members' skills. This change applies to all versions of the Salesforce app.

Service crews were already available in Lightning Experience, Salesforce Classic, and the Field Service Lightning Mobile App for Android and iOS.

To learn more about service crews, see [Create Service Crews](#) in the Salesforce Help.

EDITIONS

Field Service Lightning standard features and managed package are available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Create Service Resources for Omni-Channel Support Agents (Beta)

There's a new type of service resource in town. Create service resources of type Agent to improve case routing for agents using Omni-Channel skills-based routing (Beta). This change applies to both Lightning Experience and Salesforce Classic.

Field Service Managed Package: Service Crews and Scheduling and efficiency, Oh My

Easily set up and maintain field service objects with the new guided setup. Schedule service crews with the managed package. Verify map coordinates before they're deployed, and measure your mobile workforce efficiency.

IN THIS SECTION:

[Schedule Service Crews](#)

Service crews, introduced in Winter '18, are now available for scheduling in the Field Service Lightning managed package. Assign predefined teams of workers to service appointments, saving time and ensuring that every appointment is handled by the right workers. This change applies to both Lightning Experience and Salesforce Classic.

[Get Field Service on the Road with Guided Setup](#)

The Field Service guided setup steps you through creating service territories and operating hours, defining your work types and skill sets, assigning your agents, dispatchers, and service resources, and configuring your scheduling policies. You can use the guided setup as often as you like to adjust your field service setup. This change applies to both Lightning Experience and Salesforce Classic.

[Tune Your Field Service Efficiency](#)

Set how fast service resources complete work orders and ensure that your work type duration estimates are accurate. Each service resource can have an efficiency rating. The higher the rating the faster the resource. However, the efficiency objective is the inverse of the efficiency rating to ensure the resource is higher in priority when selecting resource for a service appointment. This change applies to both Lightning Experience and Salesforce Classic.

[Select the Right Resource Faster](#)

Agents have more information available when selecting service resource candidates. The enhanced emergency wizard now shows detailed information such as, current work order and location, so the agent can select the absolute best candidate. This change applies to both Lightning Experience and Salesforce Classic.

Schedule Service Crews

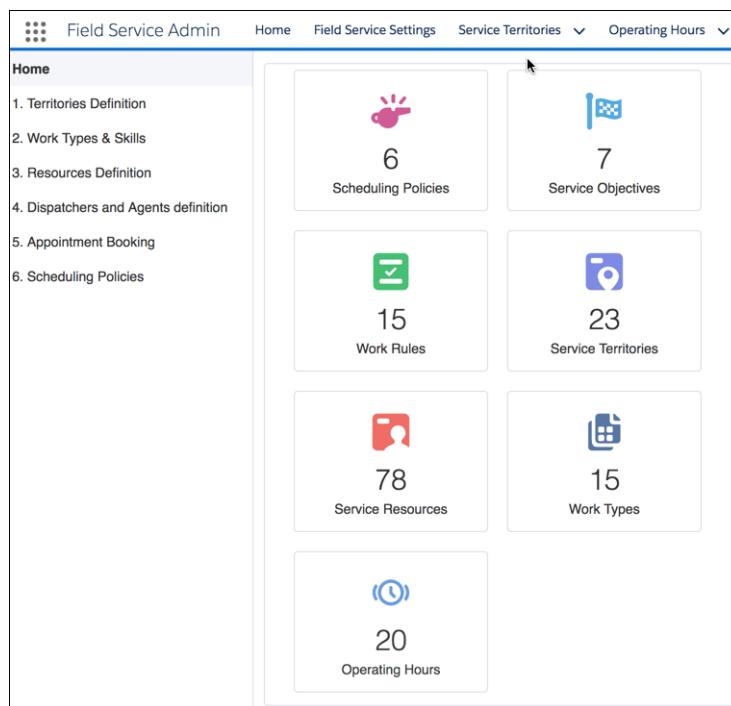
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Under **Sharing > Automation**, chose whether to give all crew members sharing rights or just the crew leader.

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The Field Service guided setup steps you through creating service territories and operating hours, defining your work types and skill sets, assigning your agents, dispatchers, and service resources, and configuring your scheduling policies. You can use the guided setup as often as you like to adjust your field service setup. This change applies to both Lightning Experience and Salesforce Classic.

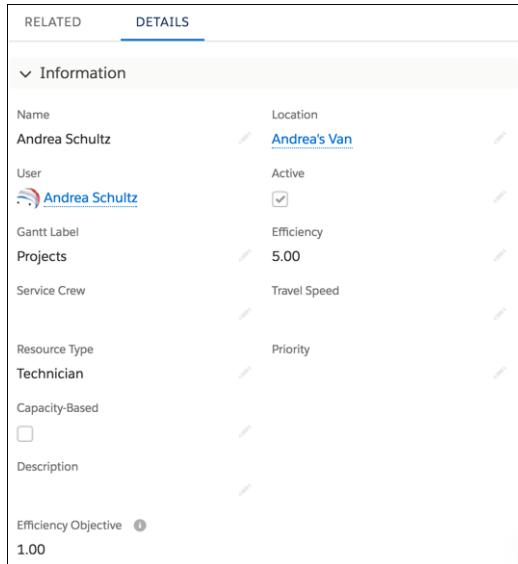
Launch the guided setup, and create or modify your field service center.



Follow the steps on the left to configure Field Service Lightning. After you complete your basic setup, you can start using the Dispatcher Console and Field Service Lightning scheduling actions, such as appointment booking with the default configuration. Advance setup allows you customize the scheduling constraints and objectives to fit your business and define your appointment booking arrival windows. You can revisit the guided setup to fine-tune your setup.

Tune Your Field Service Efficiency

Set how fast service resources complete work orders and ensure that your work type duration estimates are accurate. Each service resource can have an efficiency rating. The higher the rating the faster the resource. However, the efficiency objective is the inverse of the efficiency rating to ensure the resource is higher in priority when selecting resource for a service appointment. This change applies to both Lightning Experience and Salesforce Classic.



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Field Service for Mobile: Profile-Based Settings, Flow Enhancements, and the iOS App Turns 4.0

Assign unique sets of Field Service Mobile settings to user profiles for both iOS and Android to meet each user's needs. In the iOS app, technicians can consume products from multiple locations (beta) and admins can now control who is allowed to edit their inventory of product items. Search layouts can be used for lookup fields and resource absences in the iOS app, giving you greater control of the user interface. Finally, we made some improvements to flows in both iOS and Android.

 **Note:** The Field Service Lightning iOS app upgrades to 4.0 on 3/1/18. You can download it from the App Store.

IN THIS SECTION:

[Speed Up Service with Enhanced Flows \(iOS & Android\)](#)

Show your team how far you can go (see what we did there?) with improved Field Service Lightning mobile app flows. Set up fully localized flows that are unique to the Field Service Lightning mobile app. Then, deliver them to app users—including community users—with the help of flow actions and embedded images.

[Customize Mobile App Settings for Different Users \(iOS & Android\)](#)

Assign unique mobile settings to user profiles for a customized Field Service Lightning mobile experience. For example, configure separate settings for contractors, technicians of varying levels, and service crew leaders.

[Consume Products from Multiple Locations \(iOS\) \(Beta\)](#)

Tracking consumed products just got easier! Your mobile workforce can now add products from multiple locations to the Products Consumed related list when completing work. In addition, a new location filter on products consumed lets mobile users narrow your product item searches to a specific location.

[Control Which Users Can Edit Their Inventory \(iOS\)](#)

The **Edit Inventory** option now appears only for users with Edit permission on product items. Previously, the edit option appeared for users regardless of their permissions.

[Upload Images in Flows \(iOS\)](#)

Capturing important images in the field just got a whole lot easier. The iOS mobile app now supports flows that use screens with Lightning components for users to upload images.

[Take Control of Your Service Reports with Filters \(iOS\)](#)

You can now specify the settings for any related list on a service report template to have filter criteria. These filter criteria let you control which sorts of records will show up on that related list in the service report, letting you track exactly the information you want to show your customers and in your own records.

[Control Lookup Fields with Search Layouts \(iOS\)](#)

Records in lookup fields now come with a handy-dandy preview! To customize the preview, configure the search layout for the object referenced in a lookup field. Just like that, users see a preview of records in lookup fields.

[Customize Resource Absences \(iOS\)](#)

Resource absences on the profile page can be configured to display different fields. To change which resource absence fields users see on their profiles, use the related list settings for resource absences on the service resource page layout.

[Save Time Ordering Products with Contextual Product Requests \(iOS\)](#)

Creating product requests is simpler and faster than before. When you use a quick action to create a product request from the detail view of a work order or work order line item, the product request now inherits the work order's or line item's number. Previously, you had to manually enter the number on product requests.

Speed Up Service with Enhanced Flows (iOS & Android)

Show your team how far you can go (see what we did there?) with improved Field Service Lightning mobile app flows. Set up fully localized flows that are unique to the Field Service Lightning mobile app. Then, deliver them to app users—including community users—with the help of flow actions and embedded images.

Flows of the Field Service Mobile type can now be fully translated using Translation Workbench. If you're new to flow translation, see [Flow Components in Translation Workbench](#) in the Salesforce Help.

Finally, give your flow that special something by allowing users to embed images or attach files in a screen. For example, let a technician upload an image of the widget they're working on to document progress directly within the flow.

Customize Mobile App Settings for Different Users (iOS & Android)

Assign unique mobile settings to user profiles for a customized Field Service Lightning mobile experience. For example, configure separate settings for contractors, technicians of varying levels, and service crew leaders.

The Field Service Mobile Settings page in Setup now shows a list of settings configurations which can each be assigned to user profiles. Customizable settings for the Field Service Lightning mobile app include branding colors, geolocation accuracy, app extensions, and date picker display.

For example, suppose you want your top-tier technicians to have access to a particular app extension when they're in the field. On the Setup page, click **New** and configure the settings (making sure the app extension is included). Assign the settings to the proper user profile by clicking **Mobile Settings Assignment** on the Field Service Mobile Settings page.

Action	Label ↑	Default	Created By	Last Modified By
Edit Del	Level 1 Technician Settings	<input type="checkbox"/>	CRoge	CRoge
Edit Del	Level 2 Technician Settings	<input type="checkbox"/>	CRoge	CRoge
Edit Del	Level 3 Technician Settings	<input checked="" type="checkbox"/>	autoproc	CRoge
Edit Del	Service Crew Leader Settings	<input type="checkbox"/>	CRoge	CRoge

In addition to creating and deleting non-default mobile settings, you can customize the master label and developer name of each settings configuration.

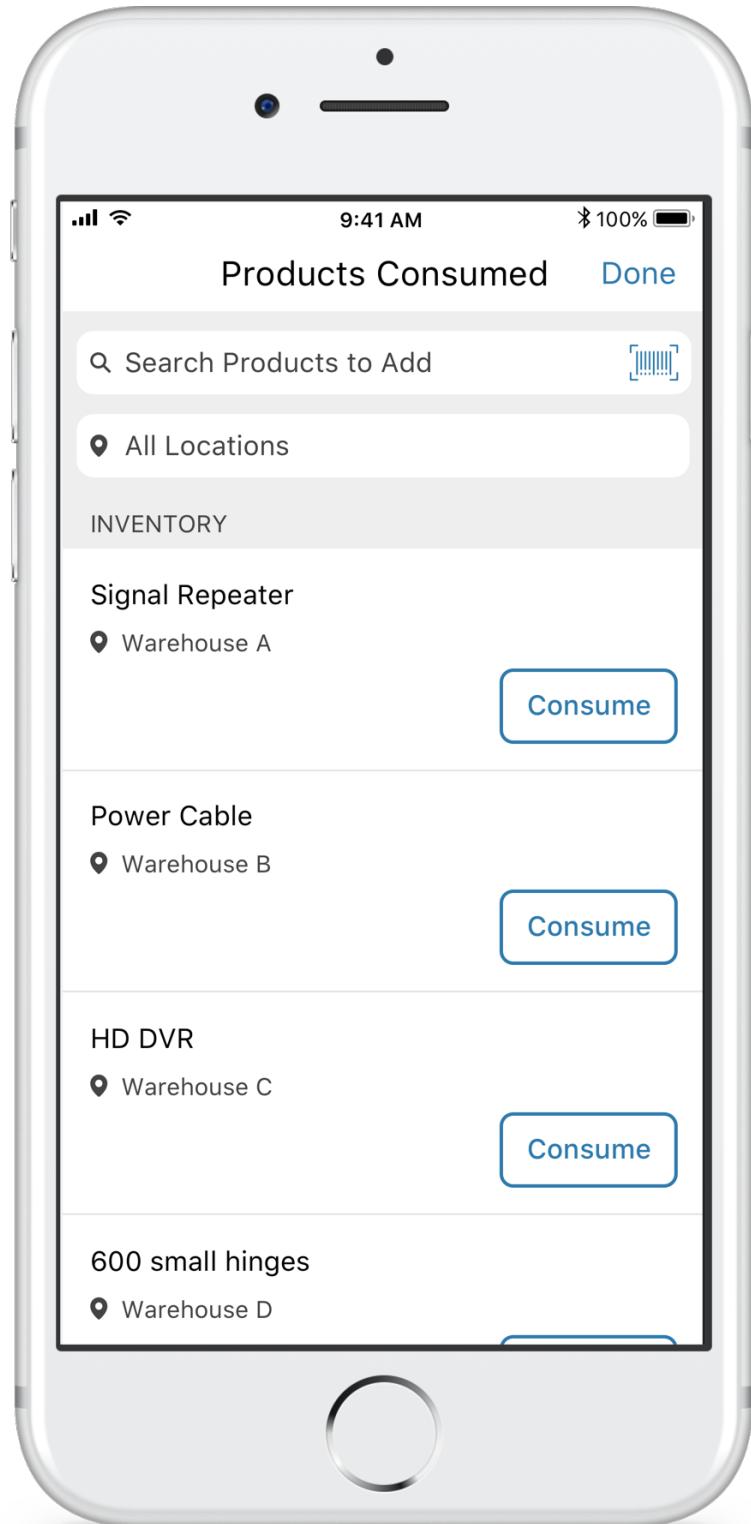
 **Note:** Experiencing déjà vu? This feature was briefly available in Winter '18, but we removed it after it suffered a bad case of stage fright. After some additional preparation, it's now ready for the spotlight!

Consume Products from Multiple Locations (iOS) (Beta)

Tracking consumed products just got easier! Your mobile workforce can now add products from multiple locations to the Products Consumed related list when completing work. In addition, a new location filter on products consumed lets mobile users narrow your product item searches to a specific location.

Previously, a work record's consumed products could only be associated with a single location. The multiple location feature also gives users new visibility into product items that are stored in other inventory locations. Users can now see the following in their product item search results:

- Product items in locations that belong to the same hierarchy as the user's own location; for example, one location is the parent of another (Hierarchical)
- Product items in locations that are associated with a work order on the user's schedule (Consignment)
- Product items in locations that are associated with the user's service territory (Cross-Border)



To get started, enable the multiple locations feature:

1. From Setup, enter *Connected Apps* in the Quick Find box and select **Connected Apps**.

2. Click **Salesforce Field Service for iOS**.
3. Scroll to the custom attribute list near the bottom of the page, and create a **New** custom attributes.
4. Use the attribute key *ENABLE_MULTIPLE_LOCATIONS*.
5. Use the attribute value “*TRUE*” to enable multiple locations, or “*FALSE*” to disable it.
6. Save your attribute.

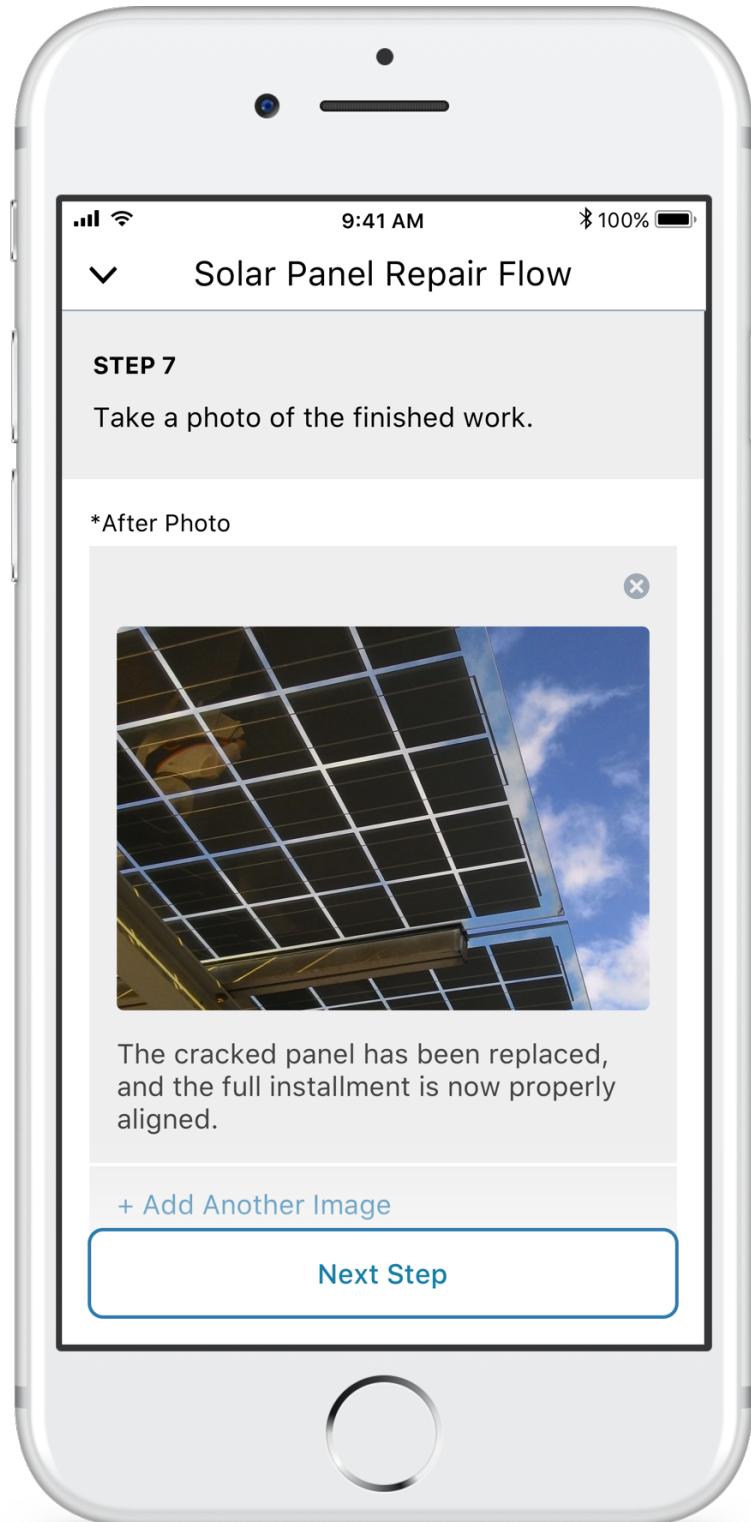
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The **Edit Inventory** option now appears only for users with Edit permission on product items. Previously, the edit option appeared for users regardless of their permissions.

Upload Images in Flows (iOS)

Capturing important images in the field just got a whole lot easier. The iOS mobile app now supports flows that use screens with Lightning components for users to upload images.

You can customize `Accepted Formats` in your flow to further specify which image file formats users can upload. Any files that are non-images or are not in the `Accepted Formats` can't be uploaded. Image uploads made as part of a flow while offline are placed in the pending upload queue.



Limits and Limitations

- No other Lightning components are supported besides image upload screens

- Content document ID is unsupported as both an input and output parameter
- For output parameters, only file names are supported

Take Control of Your Service Reports with Filters (iOS)

You can now specify the settings for any related list on a service report template to have filter criteria. These filter criteria let you control which sorts of records will show up on that related list in the service report, letting you track exactly the information you want to show your customers and in your own records.

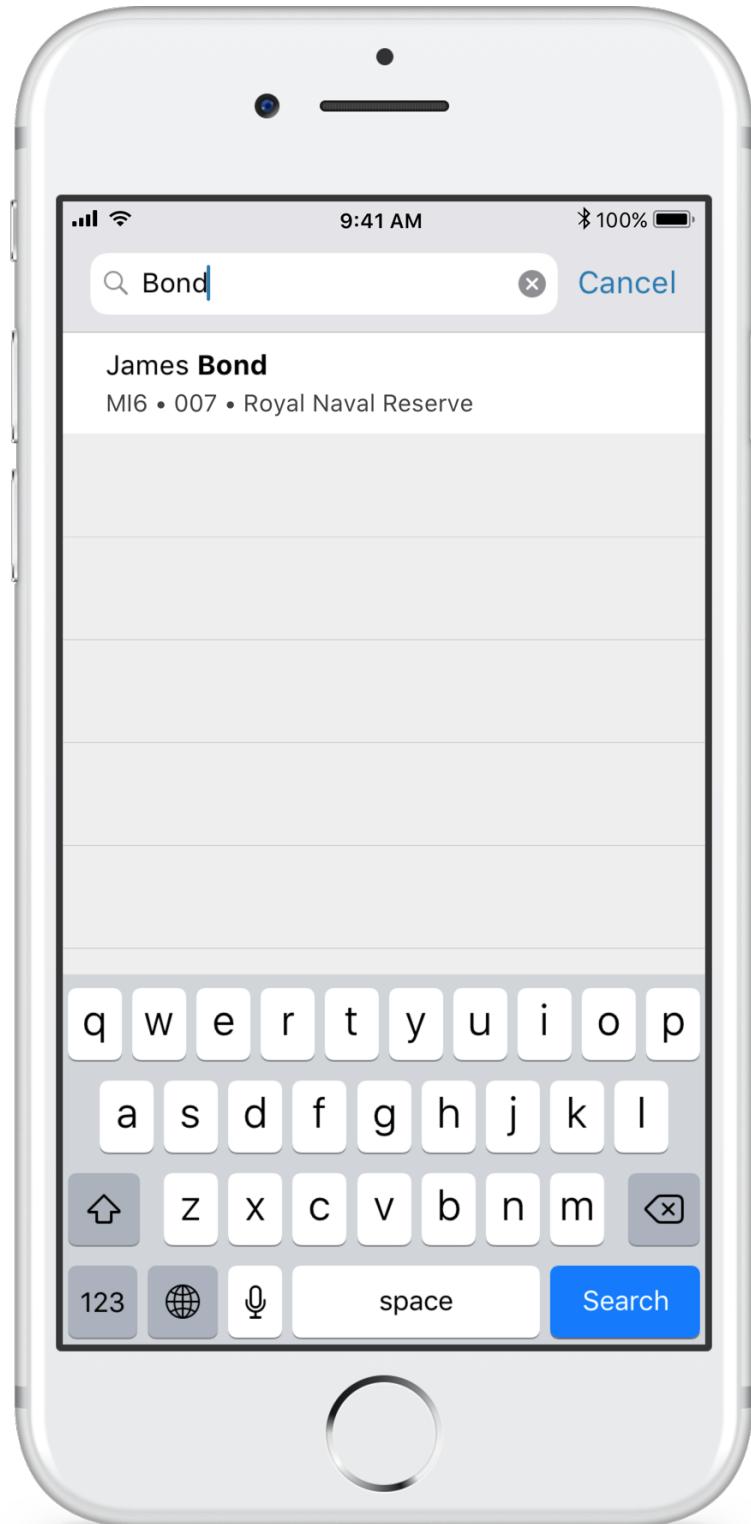
Filter criteria use “OR” logic, so if one filter criterion is met then that record will show up in the filtered list. If at least one of value in a multi-picklist meets the criteria, then the record will be show up in the filtered list.

SEE ALSO:

[Salesforce Help: Filter Related Lists on Service Reports \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Control Lookup Fields with Search Layouts (iOS)

Records in lookup fields now come with a handy-dandy preview! To customize the preview, configure the search layout for the object referenced in a lookup field. Just like that, users see a preview of records in lookup fields.



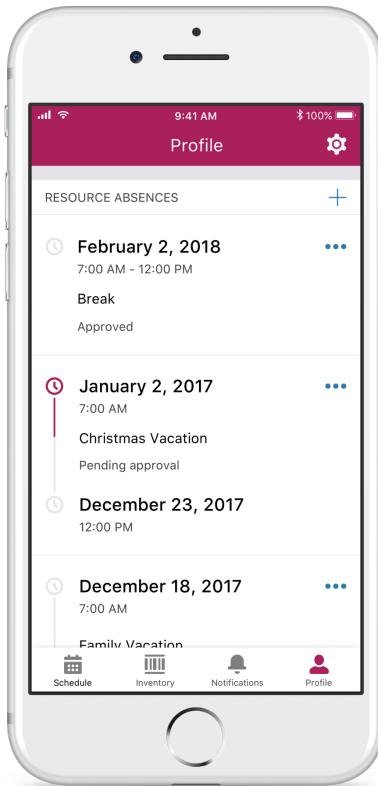
The first field in a lookup field preview is typically an identifying field such as Name or Case Number, and cannot be changed. You can select up to five other fields to appear beneath the first field in the search layout.



Note: If the record in the lookup field isn't primed, the lookup field displays as a standard field rather than using its search layout.

Customize Resource Absences (iOS)

Resource absences on the profile page can be configured to display different fields. To change which resource absence fields users see on their profiles, use the related list settings for resource absences on the service resource page layout.



The start and end times display prominently as headers if they're included in selected fields. Up to 3 selected fields that you specify appear below the header.

Save Time Ordering Products with Contextual Product Requests (iOS)

Creating product requests is simpler and faster than before. When you use a quick action to create a product request from the detail view of a work order or work order line item, the product request now inherits the work order's or line item's number. Previously, you had to manually enter the number on product requests.

After the work order number is copied into the product request, the field is read only on the app.

On product requests that are created from the app via a quick action from a work order line item detail page, the following fields are auto-populated:

- Work Order Line Item
- Work Order

! **Important:** If you update the work order or work order line item number on a product request after it is inherited, a sync error occurs when the app tries to upload the data to Salesforce. Users aren't able to upload those changes until they correct the problem.

Agent Productivity: Quick Text and Macros for All

Now macros and quick text can work together to make your day easier. Quick text is available in Lightning Experience and you can use macros on most standard and custom objects. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Increase Your Efficiency with Quick Text](#)

Why type the same message 20 times when you can insert predefined messages, like greetings, notes, and answers to common questions. You can use quick text on all standard and custom objects in the following supported quick actions: Email, Log a Call, Social, and Live Agent chats. Previously, quick text was available only in Salesforce Classic. Quick text is enabled by default in Lightning Experience.

[Let Macros Do Your Work Everywhere](#)

Don't waste your time clicking around and updating records with the same information over and over. Use macros to update most standard and custom object records in all Lightning apps. Previously, macros worked only in console navigation apps on the case, contact, lead, and custom objects. This change applies to Lightning Experience only.

[Meet the Updated Macros Utility](#)

We enhanced the look and feel of the Macros utility. A double-pane view shows a list of your macros on one side. The other side shows the selected macro's details. Links to view, edit, and run the macro are easily accessible. This change applies to Lightning Experience only.

[Use Email Templates and Attachments in Macros](#)

Email templates promote consistent messaging and increase productivity. So it's no wonder why we wanted to bring macros and email templates together. Use Lightning Experience and Salesforce Classic email templates in macros, and even attach files. This feature is new in Lightning Experience.

[Use Quick Text in Macros](#)

To double up on your productivity, use quick text in macros. You can use quick text to insert predefined messages into macro instructions. To make things even more productive, use merge fields in quick text. This feature is new in Lightning Experience.

[Open the Macros Utility with a Keyboard Shortcut](#)

Press m to quickly get to the Macros utility. The new keyboard shortcut works only if the Macros utility has been added to your app. To add the Macros utility to your app, go to the App Manager in Setup. This change applies to Lightning Experience only.

[Create Macros Faster in the Macro Builder and Do More](#)

We added keyboard shortcuts so that you navigate faster. It's easier to identify what you can do with your macro. And you can also do more with text fields. These changes apply to Lightning Experience only.

Increase Your Efficiency with Quick Text

Why type the same message 20 times when you can insert predefined messages, like greetings, notes, and answers to common questions. You can use quick text on all standard and custom objects in the following supported quick actions: Email, Log a Call, Social, and Live Agent chats. Previously, quick text was available only in Salesforce Classic. Quick text is enabled by default in Lightning Experience.

The shortcut to use quick text in Lightning Experience isn't the same as in Salesforce Classic.

- In Lightning Experience, press Ctrl+. on Windows and Cmd+. on macOS.
- In Salesforce Classic, use ; on both Windows and macOS.

EDITIONS

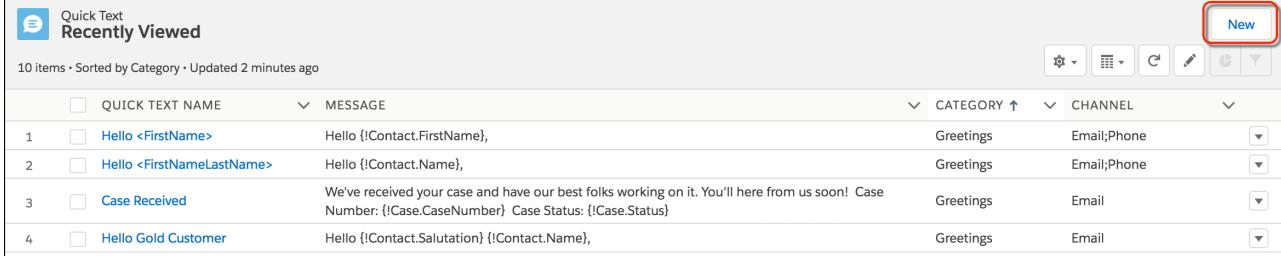
Quick text is available in:
Professional, Enterprise, Performance, Unlimited, and Developer Editions

Macros is available in:
Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

If you used quick text in Salesforce Classic, your messages work in Lightning Experience. To keep things easy for you, we made sure that Lightning Experience inherits the permissions you gave to users in Salesforce Classic to create, read, update, and delete quick text. If you've never used quick text before, give your users create, update, and delete permission on quick text.

We recommend that you add the Quick Text item to your app so that your users can track and manage all their quick text in one place. To add it to your app, use the App Manager in Setup.

To create quick text, click **New** on the quick text list view.



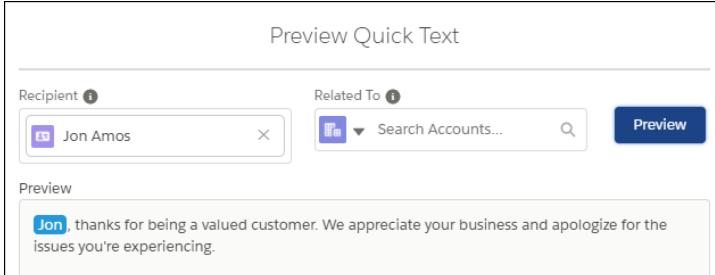
Quick Text			
Recently Viewed			
10 items • Sorted by Category • Updated 2 minutes ago			
QUICK TEXT NAME	MESSAGE	CATEGORY	CHANNEL
1 Hello <FirstName>	Hello {!Contact.FirstName},	Greetings	Email;Phone
2 Hello <FirstNameLastName>	Hello {!Contact.Name},	Greetings	Email;Phone
3 Case Received	We've received your case and have our best folks working on it. You'll here from us soon! Case Number: {!Case.CaseNumber} Case Status: {!Case.Status}	Greetings	Email
4 Hello Gold Customer	Hello {!Contact.Salutation} {!Contact.Name},	Greetings	Email

When you create quick text you give it a name, specify the text you want to reuse, and choose a category and channel. The category groups common quick text and the channel determines where you can use it. For example, if you create a greeting for emails, select the Greetings category and the Email channel.

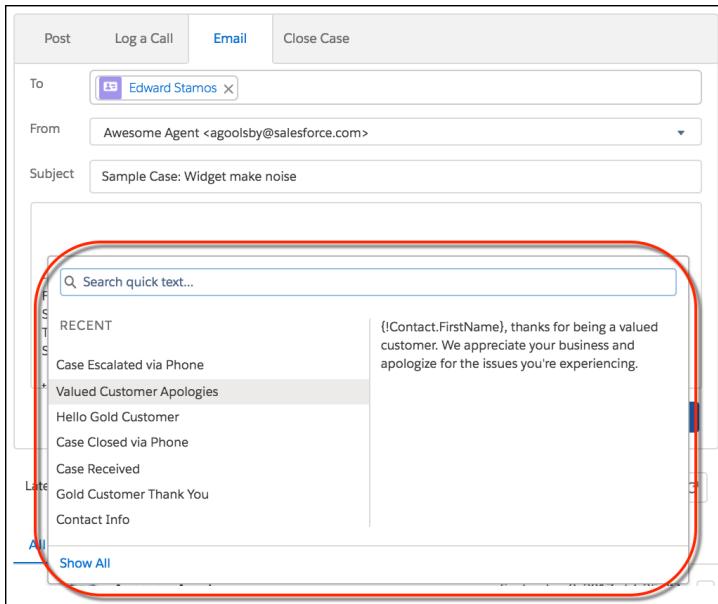
To personalize the quick text, you can add merge fields to the message. For example, create a greeting with the `Contact.FirstName` merge field to use a contact's name. You can insert merge fields for the following objects: accounts, cases, contacts, custom objects, leads, opportunities, organization, users, and work orders. Keep these things in mind when adding merge fields to quick text.

- When merge fields don't apply to the record you're working with, the merge field resolves blank. For example, quick text with the `Case.CaseNumber` merge field resolves correctly in a case's Log a Call action. However, that same merge field resolves blank when inserting quick text on a work order's Log a Call action.
- In Live Agent chats, you can only use merge fields for the following objects: account, case, contact, and lead.

To preview what a message with merge fields looks like, click **Preview** on the New Quick Text page or the record page for existing messages. Then select your specific records.



So are you ready to use quick text? Press Ctrl+ on Windows and Cmd+ on macOS. Then select the quick text you want to insert.



You can search your quick text to find exactly what you need. If your search results only find one item, simply press Enter to insert the message.

SEE ALSO:

[Use Quick Text in Macros](#)

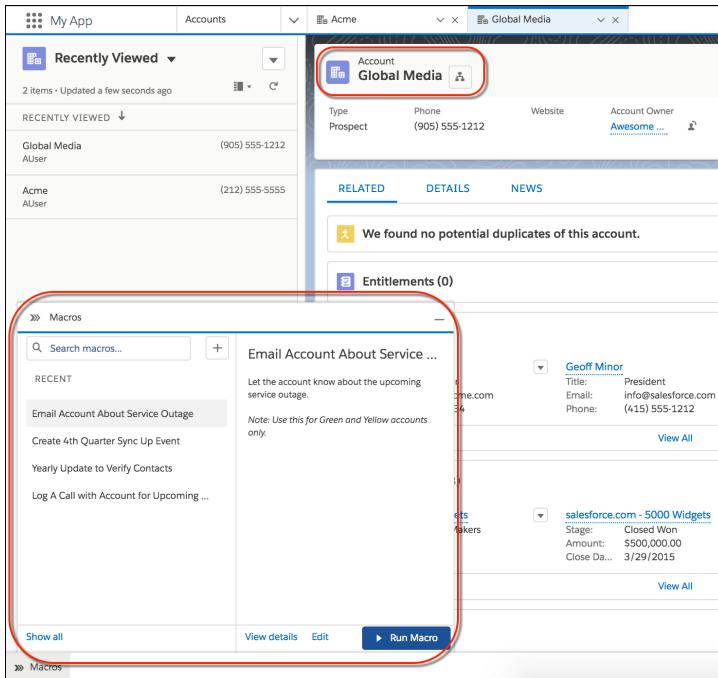
[Salesforce Help: Quick Text Considerations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Give Users Access to Quick Text](#) (can be outdated or unavailable during release preview)

Let Macros Do Your Work Everywhere

Don't waste your time clicking around and updating records with the same information over and over. Use macros to update most standard and custom object records in all Lightning apps. Previously, macros worked only in console navigation apps on the case, contact, lead, and custom objects. This change applies to Lightning Experience only.

Here's a macro that's set up to work with accounts.



To let your users create and use macros, make sure they have the correct permissions. See [Create Macros in Lightning Experience](#) in our online help.

Macros works on all objects that allow quick actions and have a customizable page layout. However, we recommend that you don't use macros with the following items.

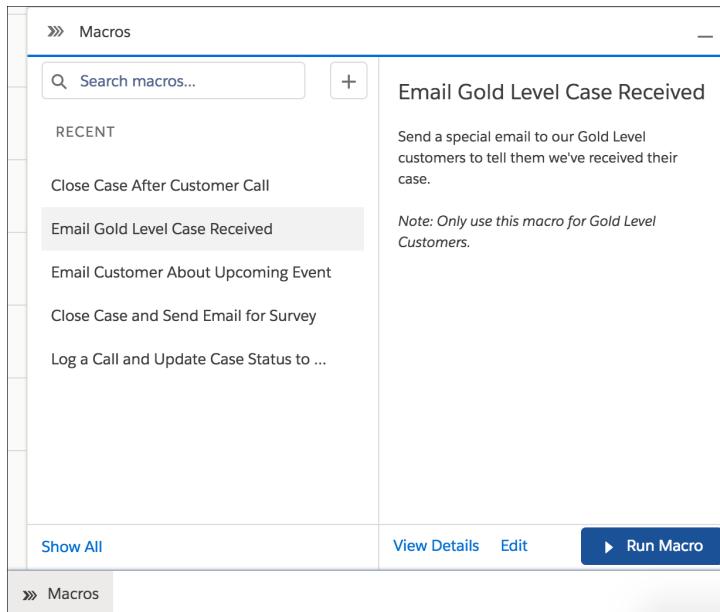
- Opportunity products
- Crew Size field on the Service Crew object
- Knowledge articles
- Email message object (not to be confused with the Email action, which works fine with macros)
- Social quick action in the case feed publisher provided with Social Customer Service

SEE ALSO:

- [Meet the Updated Macros Utility](#)
- [Use Email Templates and Attachments in Macros](#)
- [Use Quick Text in Macros](#)
- [Open the Macros Utility with a Keyboard Shortcut](#)
- [Create Macros Faster in the Macro Builder and Do More](#)

Meet the Updated Macros Utility

We enhanced the look and feel of the Macros utility. A double-pane view shows a list of your macros on one side. The other side shows the selected macro's details. Links to view, edit, and run the macro are easily accessible. This change applies to Lightning Experience only.



Tip: To save you time, we also made minor updates to what you can do with your keyboard.

- If your search results only find one item, simply press Enter to run the macro.
- If your focus is on the search bar, press the down arrow to navigate the macro list. Then press Enter to run a macro.

Use Email Templates and Attachments in Macros

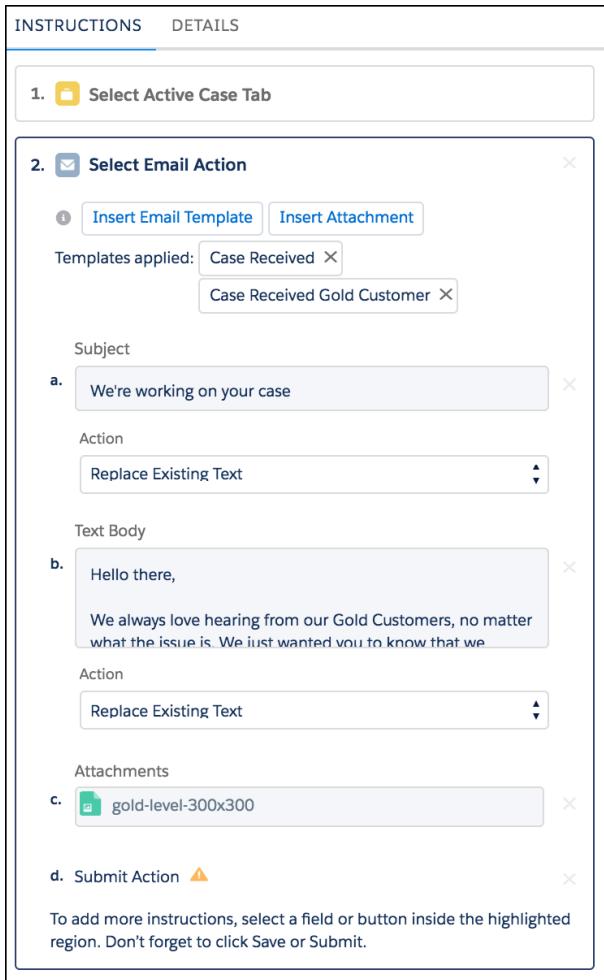
Email templates promote consistent messaging and increase productivity. So it's no wonder why we wanted to bring macros and email templates together. Use Lightning Experience and Salesforce Classic email templates in macros, and even attach files. This feature is new in Lightning Experience.

To add an email template to a macro, click the **Email** action in Macro Builder. Then click **Insert Email Template**. You can also apply more than one template. For example, you can use the Subject of one email template and the Body of another.

To attach a file, click **Insert Attachment**.



Tip: If an email template includes an attachment, it's automatically included in the macro. Click the **X** to remove it.



To review what's included in the template, use the Preview icons on the app's macro record page.

If an email template is updated, the macro automatically uses the updated template, too.



Note: Salesforce has two types of attachments: ones uploaded in Salesforce Classic and ones uploaded in Lightning Experience. If the attachment was uploaded in Salesforce Classic, add it to a Salesforce Classic template, and then apply that template to the macro. The same applies to Lightning Experience. Add the attachment to a Lightning email template, or you can simply click **Insert Attachment**.

Use Quick Text in Macros

To double up on your productivity, use quick text in macros. You can use quick text to insert predefined messages into macro instructions. To make things even more productive, use merge fields in quick text. This feature is new in Lightning Experience.

Quick text in Lightning Experience is enabled by default. Look for the quick text icon in Macro Builder.

The screenshot shows the Macro Builder interface. A step is being edited with the action "Select Log a Call Action". Within this step, a sub-step "a." is being configured. The "Action" dropdown is set to "Replace Existing Text". A red box highlights the "Search quick text..." input field, which contains the text "Hello <Name>". Below the search field, a list of recent quick texts is shown, including "Hello <FullName>" and "Customer Call Closed Case". The "Customer Call Closed Case" item is currently selected. The preview pane on the right shows the resulting text: "Talked to customer on the phone and case was closed. There are no additional issues."

On the macro record page, use the Preview icon to review what's included in the template.

 **Note:** Macros don't observe quick text channels. For example, let's say you set up quick text to be used only on one channel, such as Email. When the quick text is in a macro, it can also be used on actions like Log A Call.

Open the Macros Utility with a Keyboard Shortcut

Press m to quickly get to the Macros utility. The new keyboard shortcut works only if the Macros utility has been added to your app. To add the Macros utility to your app, go to the App Manager in Setup. This change applies to Lightning Experience only.

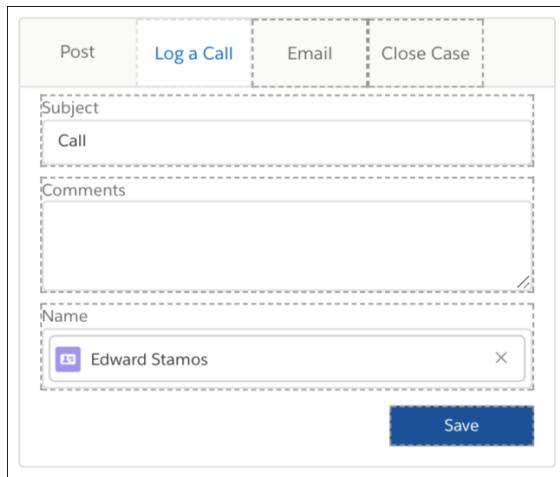
Here's the new Macros shortcut in the Keyboard Shortcuts panel. To view this panel, press Ctrl + / on Windows or Cmd + / on macOS.

Keyboard Shortcuts					
Global		Navigation		Tabs	
Close or deselect	Esc	Focus notifications	c	Close workspace tab	⇧+x
Copy URL for active tab	⌘+c, then s	Focus notifications (reverse order)	⇧+c	Refresh tab	⇧+r
Copy URL for active workspace tab and subtabs	⌘+c, then w	Go to docked composer	g, then d		
		Go to item menu	g, then i		
Edit	e	Go to list view	g, then l		
Insert quick text	⌘+.	Go to publisher	g, then p		
Open or close History	h	Go to subtab	g, then s		
Open or close Macros	m	Go to utility bar	g, then u		
Open or close Notes	n	Go to workspace tab	g, then w		
Open or close Omni-Channel	o	Switch tabs	← or →		
Post to feed	⌘+Enter	Switch walkthrough focus	F6		
Save	⌘+s				
Search	/				
Show this menu	⌘+/				
 ⇧ Shift ⌘ Command					

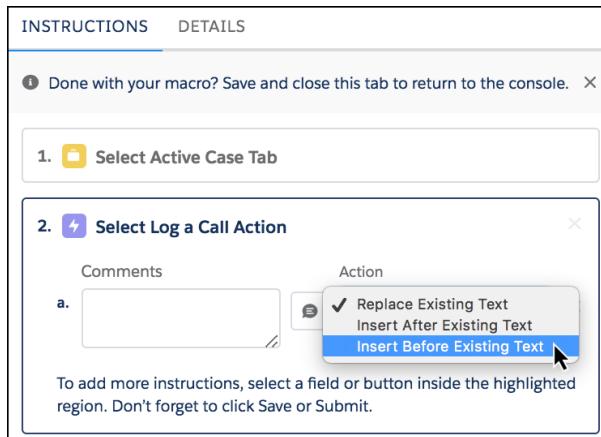
Create Macros Faster in the Macro Builder and Do More

We added keyboard shortcuts so that you navigate faster. It's easier to identify what you can do with your macro. And you can also do more with text fields. These changes apply to Lightning Experience only.

Selectable actions and fields are highlighted with a dotted border.



You can insert up to 4,000 characters in most text fields. Previously, you could use only 1,000 characters. You can also insert text before existing text. Previously, you could only replace text or insert it after the existing text.



To view the available keyboard shortcuts for Macro Builder, press Ctrl + / on Windows or Cmd + / on macOS. Or you can use the Help menu.



Keyboard Shortcuts	
Global	
Save	⌘ + S
Show this menu	⌘ + /
Switch panel focus	F6
Canvas	
Select focused element	Spacebar
Switch focus to next element	Tab
Switch focus to previous element	⇧ + Tab
⇧ shift ⌘ command	

SEE ALSO:

[Salesforce Help: Create Macros in Lightning Experience](#) (can be outdated or unavailable during release preview)

Cases: Mass Quick Actions, Cases for Path, and Email Enhancements

We are really opening up the capability of Quick Actions where you can run actions on multiple records of Case, Leads, or Custom Objects. Mass quick actions for creating and updating records allows agents to be more efficient. Use Path for Cases to determine and customize the Case stages that are important to your organization and provide guidance for Agent success. Enhancements around email that continue to push agent productivity to the forefront.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Mass Quick Actions in Lightning Experience](#)

Agents can now perform mass quick actions on up to 200 items in a list view for Cases, Leads, and custom objects. Not only is this a huge time saver for your agents, but managers will love this because keeping clean data just got much easier.

[Email Search has Finally Arrived](#)

Searching for emails in Salesforce is now possible.

[Reply and Forward Email](#)

You can now forward emails in the Case Feed! In addition, the Reply, Reply All, and Forward buttons are available in the Case Feed, Email Message record home, and Case Email Related List.

[Email Default Publisher is Now HTML](#)

The email publisher now has an HTML default making it easier for agents to use HTML content in Lightning Experience.

[Case Path for Lightning Experience](#)

Use Path to set up a flow for Case records, allowing your agents to focus on the most critical information.

[Send Actions Setup Page is Available in Lightning Experience](#)

If your org has draft emails enabled, you can build approval processes to make sure that the right people approve the drafts before they're emailed to the recipients. Configure send actions, which automatically send the draft emails, from Lightning Experience. Previously, you had to switch to Salesforce Classic to configure send actions.

Mass Quick Actions in Lightning Experience

Agents can now perform mass quick actions on up to 200 items in a list view for Cases, Leads, and custom objects. Not only is this a huge time saver for your agents, but managers will love this because keeping clean data just got much easier.

- From a list view, agents can create or update multiple records to perform daily functions such as updating case comments or updating case status.
- Mass quick actions is available only in Lightning experience for standard and console navigation Apps.
- To enable your agents to use mass quick actions, go to the Search Layout for the appropriate object and edit the List View Search Layout.

SEE ALSO:

[Salesforce Help: Mass Quick Actions Considerations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Setup Mass Quick Actions](#) (can be outdated or unavailable during release preview)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Email Search has Finally Arrived

Searching for emails in Salesforce is now possible.

Global Search in Lightning Experience for:

- Bcc Address, Cc Address, From, Address, Subject, Text Body, To Address.
- All custom fields of type text, text area, long text area, rich text area, email, and phone.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

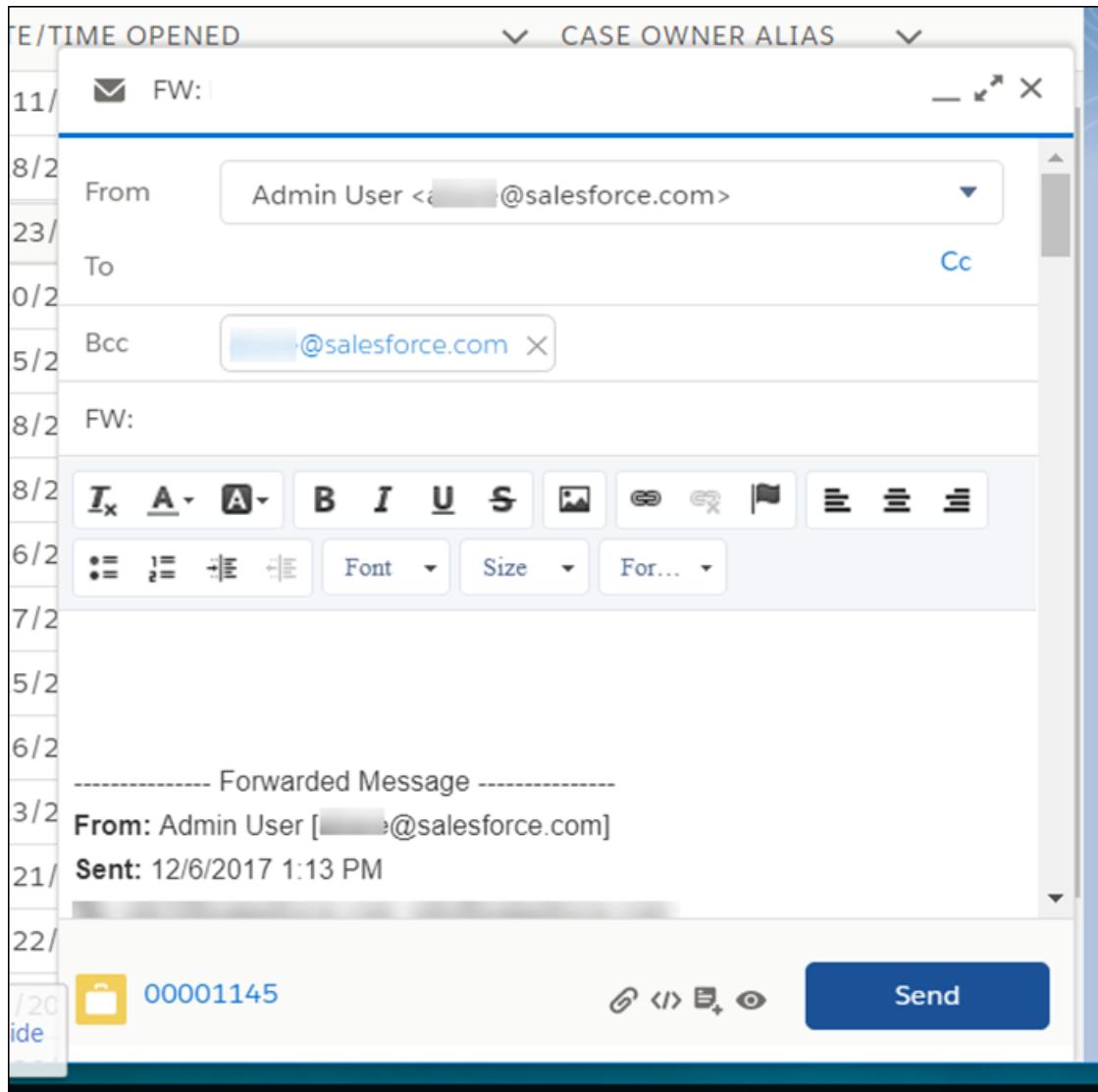
Reply and Forward Email

You can now forward emails in the Case Feed! In addition, the Reply, Reply All, and Forward buttons are available in the Case Feed, Email Message record home, and Case Email Related List.

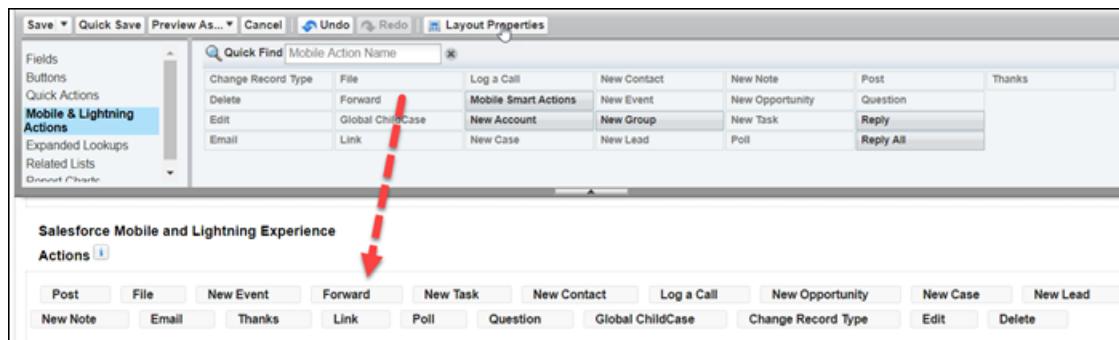
Reply, Reply all, or Forward from the Record Home or Related lists, now displays a docked email composer outside of the Case Feed.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



- You enable this from the Page Layout Editor, by selecting the Edit Email Message Layout and ordering the items from the Mobile and Lightning Actions selection.



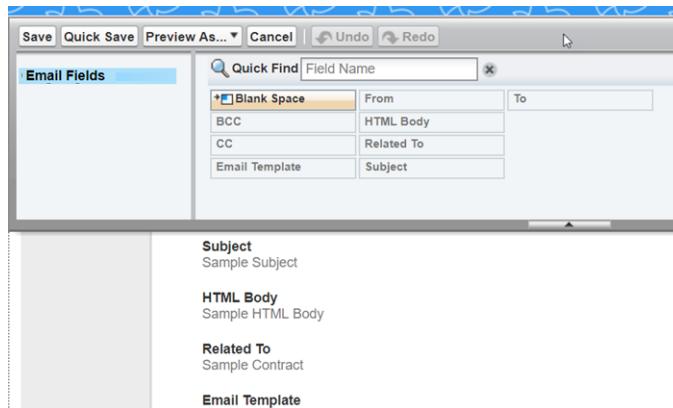
Note: These actions are specific only to Case Email.

Email Default Publisher is Now HTML

The email publisher now has an HTML default making it easier for agents to use HTML content in Lightning Experience.

The email publisher now has HTML as the body default. You must have Email-to-Case enabled to use the Send Email quick action on the Cases object. The Send Email quick action is created by default when you enable Email-to-Case on new orgs. If your org was created before Spring '17, or if you enabled Email-to-Case before Spring '17, create a Send Email quick action.

1. You need to Create the Send Email quick action.
2. Arrange the email fields in the order that you want. When an agent selects the quick action, the email fields are displayed in this order.
3. From the Email Message Fields menu, drag fields into the email layout. To remove fields, drag them from the email layout to the Email Message Fields section. The new list is: To Address, Cc Address, Bcc Address, Subject, and HTML Body



Case Path for Lightning Experience

Use Path to set up a flow for Case records, allowing your agents to focus on the most critical information.

With Case Path, you can determine and customize the stages that are important to your organization and provide guidance for agent success. Include details about critical information for each stage of the Case plus tips for establishing and maintaining positive customer relationships, and even links to relevant feeds.

Path steps, consisting of the picklist field values can be:

- Filtered depending on the record type
- Reordered by changing the order of the values in the picklist field definition.

SEE ALSO:

[Salesforce Help: Path \(can be outdated or unavailable during release preview\)](#)

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Send Actions Setup Page is Available in Lightning Experience

If your org has draft emails enabled, you can build approval processes to make sure that the right people approve the drafts before they're emailed to the recipients. Configure send actions, which automatically send the draft emails, from Lightning Experience. Previously, you had to switch to Salesforce Classic to configure send actions.

-  **Note:** This change refers to the configuration page Send Actions in Setup, which is now available in Lightning Experience. The ability to create and work with email drafts isn't available in Lightning Experience yet.

Service Console: Pinned Region Pages, Quick Text, and Mass Quick Actions

Add pinned regions to let your agents keep displaying case record information while viewing subtabs. Agents can now use quick text, perform mass actions on their cases, and much more. These changes apply to Lightning Experience only.

-  **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more](#).

You can't migrate Salesforce Classic console apps to Lightning Experience.

Editions

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with Service Cloud

IN THIS SECTION:

[Work and Respond Faster in the Service Console](#)

Service agents can use quick text to insert predefined messages, like greetings and notes in social posts, Live Agent chats, and more. Do away with repetitive tasks by creating macros on more objects. And agents can update multiple cases at once from the list view. These changes apply to Lightning Experience only.

[Guide Your Agents with Lightning Flow for Service \(Pilot\)](#)

Remove the confusion of multi-step tasks with Lightning Flow for Service. When a service issue comes into the console, a preconfigured flow can be associated to the record and launched. The agent walks through the flow and can add more flows as needed. Lightning Flow for Service lets you enforce your business processes by presenting flows as primary tabs or subtabs in console apps. And all this functionality is configured with clicks, not code! This feature is new in Lightning Experience.

[Get Started with Omni-Channel in Lightning Experience with a New Setup Flow](#)

Whether you're new to Omni-Channel or you just want to check it out in Lightning Experience, you'll love the new Omni-Channel flow in Service Setup. The flow walks you through setting up and prioritizing your queues, and it adds the Omni-Channel utility to your default Service Console app so you can test it out. This change applies to Lightning Experience only.

[Add Knowledge to Your App with the Knowledge Setup Flow](#)

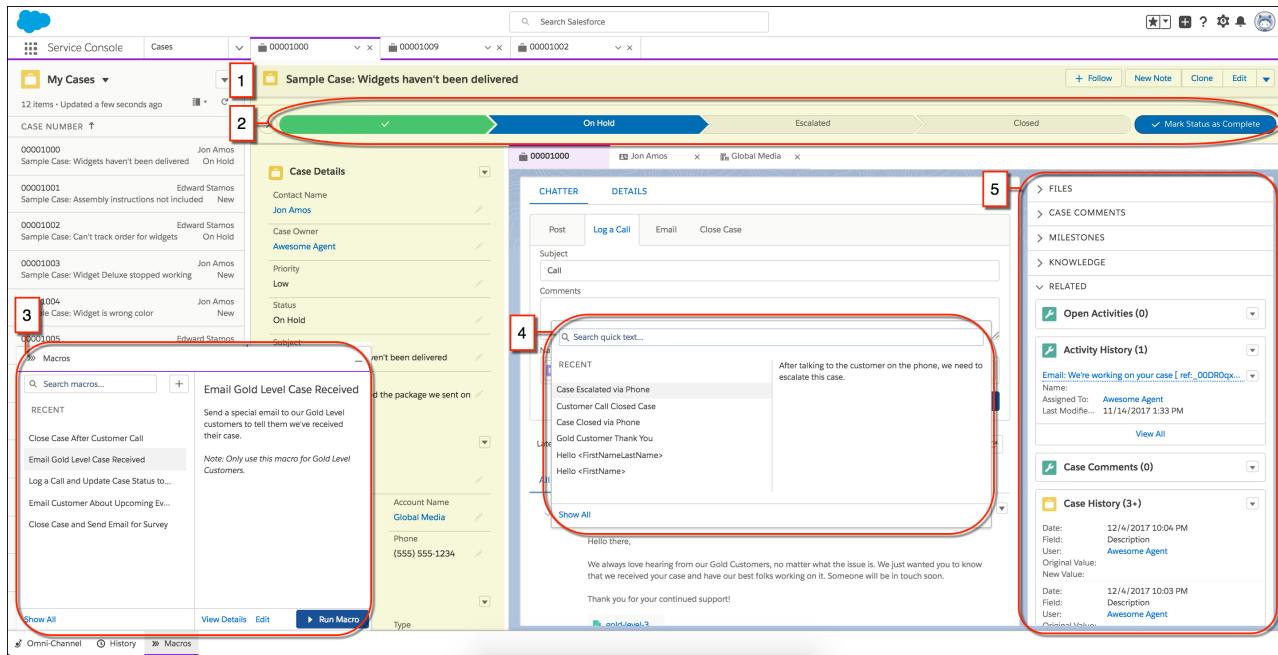
The Lightning Knowledge Service Setup flow now adds Knowledge to the item menu in the Service Console app. If you've already enabled Lightning Knowledge, you can add Knowledge to the item menu using the App Manager in Setup. This change applies to Lightning Experience only.

SEE ALSO:

[Salesforce Help: Lightning Experience Console Limitations](#) (can be outdated or unavailable during release preview)

Work and Respond Faster in the Service Console

Service agents can use quick text to insert predefined messages, like greetings and notes in social posts, Live Agent chats, and more. Do away with repetitive tasks by creating macros on more objects. And agents can update multiple cases at once from the list view. These changes apply to Lightning Experience only.



Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again (1)

Customize the Service Console app with pinned region pages so that your agents can view and work with record information on different subtabs. The pinned region in the screen shot is highlighted in yellow.

Guide Your Agents with Case Path (2)

Path guides your agents along the steps in a case process, such as initially responding to the case, escalating it, and closing it.

Let Macros Do Your Work Everywhere (3)

Agents can now use macros to update most standard and custom object records in the Service Console app.

Increase Your Efficiency with Quick Text (4)

Save time and insert predefined messages. Agents can use quick text on all standard and custom objects in the following supported quick actions: Email, Log a Call, Social, and Live Agent chats.

Reduce the Noise on Your Console Pages with Collapsible Sections (5)

Organize and present information in sections that collapse and expand by customizing your Service Console app pages with the Accordion component.

Perform Mass Quick Actions on Cases

Your agents can now execute quick actions on multiple records, up to 200 items, in a list view for cases, leads, and custom objects.

Use Web Tabs to Display Third-Party Content in the Lightning Console

Use web tabs with third-party domains so that your agents can access web applications or other websites from within the Service Console app.

Use Classic Console Integration Toolkit Methods in Lightning Experience

Starting with API version 42.0 of the Salesforce Console Integration Toolkit, many of the Salesforce Classic methods used in existing Visualforce pages and third-party web tabs work in Lightning Experience.

Override Lightning Component Actions in Lightning Console Apps

Get ready for deeper control over what your agents see when looking at a record, editing a record, or opening a list. Action overrides that use Lightning components for View, New, Edit, and Tab are now supported in the Service Console app.

Copy and Share Subtab and Workspace URLs Using Keyboard Shortcuts

We've made it super easy for agents to share links to active subtabs or the entire workspace with all its subtabs.

Use Visualforce URLs in Lightning openTab and openSubtab Methods

Want to open a Visualforce page in a workspace or subtab in the Service Console app? With the Lightning Console JavaScript API methods `openTab` and `openSubtab`, just specify the `/apex/myVFPage` URL.

Detect the Lightning Console UI Theme in Visualforce Pages

Now your Visualforce pages can detect whether they are loaded in the UI theme for Lightning apps with console navigation versus the UI theme for Lightning apps with standard navigation.

SEE ALSO:

[Salesforce Help: Lightning Experience Console Limitations](#) (can be outdated or unavailable during release preview)

Guide Your Agents with Lightning Flow for Service (Pilot)

Remove the confusion of multi-step tasks with Lightning Flow for Service. When a service issue comes into the console, a preconfigured flow can be associated to the record and launched. The agent walks through the flow and can add more flows as needed. Lightning Flow for Service lets you enforce your business processes by presenting flows as primary tabs or subtabs in console apps. And all this functionality is configured with clicks, not code! This feature is new in Lightning Experience.

 **Note:** We provide Lightning Flow for Service to selected customers through a pilot program that requires agreement to specific terms and conditions. Lightning Flow for Service is subject to change and isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

To join this pilot, contact your Salesforce Account Executive or Success Manager.

Now let's get down to the nitty-gritty. Lightning Flow for Service introduces a new junction object called Record Action, that lets you associate records to flows using Salesforce automation tools. When records are opened and there's an associated flow, the flow is launched as a subtab.

After you set up your processes with the Record Action object, you add the Action List component to pages to display your processes to agents. This component helps your agents:

- Identify which actions to complete using a set of associated flows
- Add more actions based on customer needs

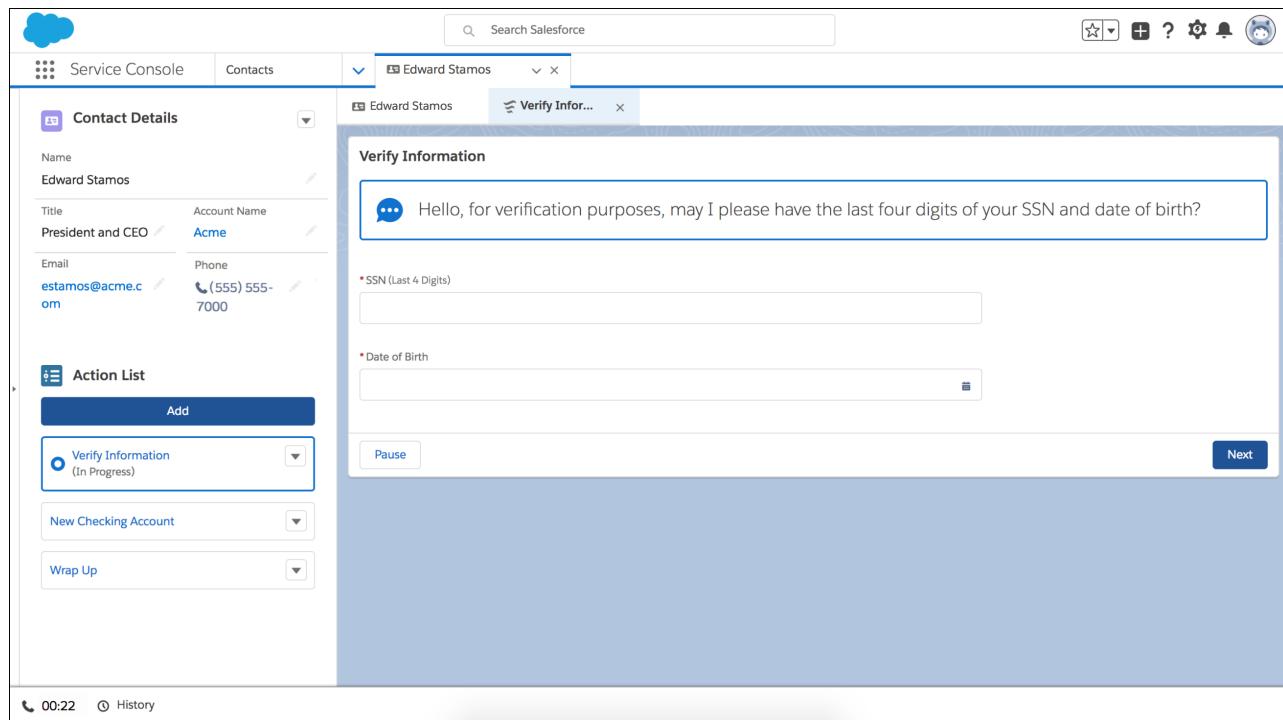
 **Note:** The Action List component displays only screen flows.

Do you have a business need to use flows outside of a console app? Then we've got good news. You can use Lightning Flow for Service in apps with standard navigation, too.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Service Cloud

Here's an example of a flow in the Service Console app that helps agents verify contact information for an incoming caller.



Lightning Flow for Service is built on the Lightning platform, which means partners can create AppExchange packages with customized solutions for your business needs.

Get Started with Omni-Channel in Lightning Experience with a New Setup Flow

Whether you're new to Omni-Channel or you just want to check it out in Lightning Experience, you'll love the new Omni-Channel flow in Service Setup. The flow walks you through setting up and prioritizing your queues, and it adds the Omni-Channel utility to your default Service Console app so you can test it out. This change applies to Lightning Experience only.

The Omni-Channel setup flow takes you through creating necessary Omni-Channel objects like a routing configuration and queue, and gets you started with a Cases service channel. You also add users so they can receive work requests in the console and decide their work capacity. To create queues with different work item sizes and priorities, run the flow again.

To launch the flow, open the Service Setup home page and look for the Omni-Channel Setup tile at the top of the page.

When you're done, you can go to the Process Builder to set criteria that sends incoming cases straight to your Omni-Channel queues.

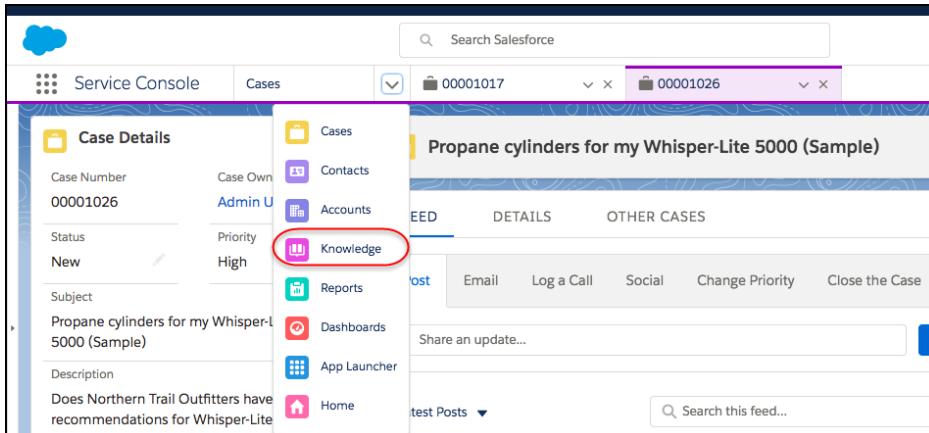
Tip: Make sure to add yourself as a user during the flow so you can go straight to your default Service Console app and log in as an Omni-Channel agent. Then you can send a case to your queue and watch it appear as a work request in the Omni-Channel utility.

SEE ALSO:

[Salesforce Help: Omni-Channel Setup Flow: What's Next? \(can be outdated or unavailable during release preview\)](#)

Add Knowledge to Your App with the Knowledge Setup Flow

The Lightning Knowledge Service Setup flow now adds Knowledge to the item menu in the Service Console app. If you've already enabled Lightning Knowledge, you can add Knowledge to the item menu using the App Manager in Setup. This change applies to Lightning Experience only.



Live Agent: Quick Text and Knowledge Support in Lightning Experience

Agents can quickly insert standardized responses with quick text and look up knowledge articles while chatting in Lightning Experience. Agents also can delete Waiting transcripts in both Salesforce Classic and Lightning Experience. Seamless releases ensure a better experience for chats that are in progress when a release is delivered.

IN THIS SECTION:

[Chat Faster with Quick Text in Lightning Experience](#)

Let agents reap the productivity rewards of using quick text while chatting in Lightning Experience. Agents can quickly insert standardized responses, such as answers to common customer questions, in Live Agent chats. This change applies to Lightning Experience only.

[Chat Smarter with Lightning Knowledge](#)

Let agents access the wealth of information in your Salesforce Knowledge base when chatting in Lightning Experience. Agents can use the search bar in the Knowledge component to search for articles. This change applies to Lightning Experience only.

[Delete Waiting Chat Transcripts](#)

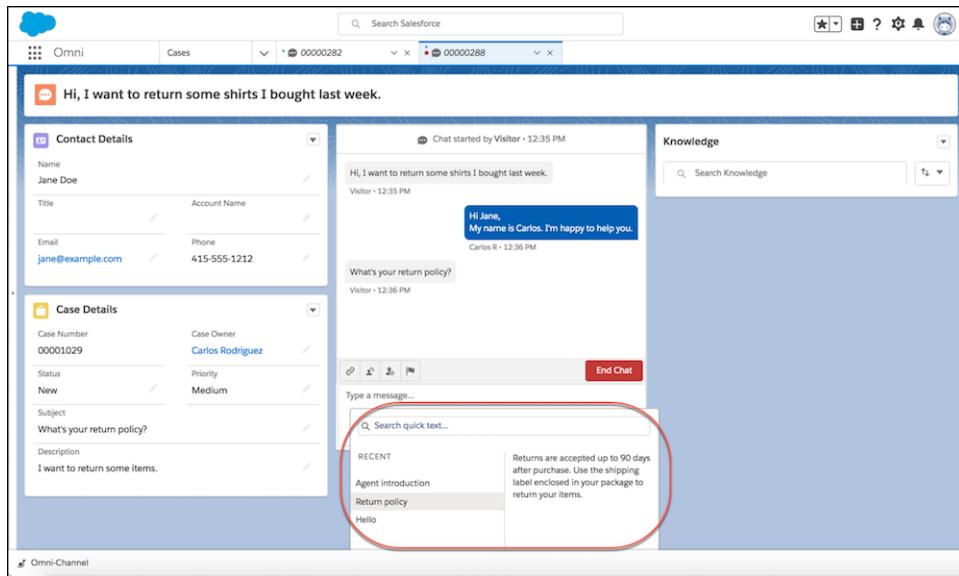
Clearing out old transcripts? You can delete chat transcripts that are more than 24 hours old that have a Waiting status. Previously, you couldn't delete transcripts that had the Waiting status. This change applies to both Lightning Experience and Salesforce Classic.

[Seamless Releases for Chats](#)

Seamless releases let Salesforce push releases to orgs with no interruption to chats that are in progress. Enjoy the excitement of a new release with the confidence that agents can chat unimpeded. This change applies to both Lightning Experience and Salesforce Classic.

Chat Faster with Quick Text in Lightning Experience

Let agents reap the productivity rewards of using quick text while chatting in Lightning Experience. Agents can quickly insert standardized responses, such as answers to common customer questions, in Live Agent chats. This change applies to Lightning Experience only.



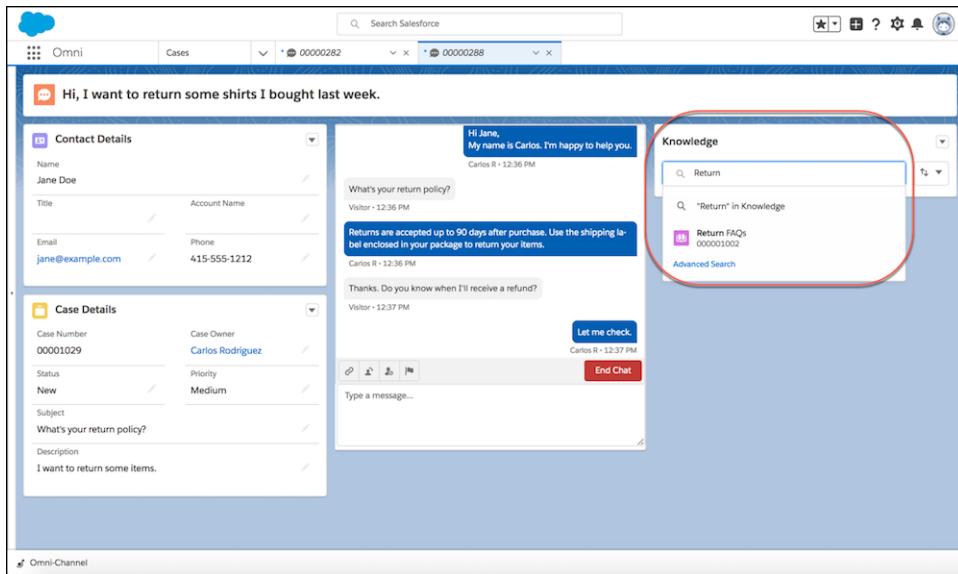
SEE ALSO:

[Increase Your Efficiency with Quick Text](#)

[Salesforce Help: Send Quick Text Messages in Chats](#) (can be outdated or unavailable during release preview)

Chat Smarter with Lightning Knowledge

Let agents access the wealth of information in your Salesforce Knowledge base when chatting in Lightning Experience. Agents can use the search bar in the Knowledge component to search for articles. This change applies to Lightning Experience only.



SEE ALSO:

[Salesforce Help: Customize Your Lightning Console Pages](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Search Articles in the Main Search Box and the Knowledge Sidebar](#) (can be outdated or unavailable during release preview)

Delete Waiting Chat Transcripts

Clearing out old transcripts? You can delete chat transcripts that are more than 24 hours old that have a Waiting status. Previously, you couldn't delete transcripts that had the Waiting status. This change applies to both Lightning Experience and Salesforce Classic.

Seamless Releases for Chats

Seamless releases let Salesforce push releases to orgs with no interruption to chats that are in progress. Enjoy the excitement of a new release with the confidence that agents can chat unimpeded. This change applies to both Lightning Experience and Salesforce Classic.

Omni-Channel: Skills-Based Routing and More to Love in Lightning Experience

Route work to agents using skills instead of queues with skills-based routing (beta). Omni-Channel Supervisor is generally available in Lightning Experience, and External Routing (beta) is available in Lightning Experience. The console methods for Lightning Experience that we introduced in Winter '18 are generally available. The Omni-Channel events that you love in Salesforce Classic are now available in Lightning Experience. We also raised our routing limits and added functionality with workflows and triggers.

EDITIONS

Available in: **Salesforce Classic, Lightning Experience**

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:[**Get the Right Work to the Right Agent, Right Away, with Skills-Based Routing \(Beta\)**](#)

Assign skills to your agents, and route work items to them based on their skill sets with skills-based routing (beta). You can use skills-based routing instead of queues as a more flexible way of routing cases and work items. Skills-based routing uses the Service Resource, Skill, and Pending Service Routing objects and is set up through the API. Contact Salesforce to enable skills-based routing for Omni-Channel. This change applies to both Lightning Experience and Salesforce Classic.

[**Use External Routing \(Beta\) in Lightning Experience**](#)

Your agents can handle externally routed work in Lightning Experience. Previously, agents had to use Salesforce Classic to accept external work items. External routing (Beta) lets you integrate an external routing implementation with Omni-Channel so your agents can receive work from any source, all in one console. Contact Salesforce to enable external routing for Omni-Channel. This change applies to Lightning Experience only.

[**Monitor Your Support Center with Omni-Channel Supervisor in Lightning Experience \(Generally Available\)**](#)

Omni-Channel Supervisor is generally available in Lightning Experience. Omni-Channel Supervisor updates continuously to reflect the latest data, so you always know how your support center's doing. Information about your Omni-Channel agents, queues, and work is streamed live into the panel. Yes, you read that right: live. You see waiting times, open work, and more in real time. Plus, you can use the same compact layout functionality that you love in Salesforce Classic to display the details that matter most to your team.

[**Let Supervisors See Only What Matters in Omni-Channel Supervisor \(Beta\)**](#)

Your supervisors don't need to see every agent in the entire call center in the agent views. Get rid of the noise! Create supervisor configurations that filter the agent views to show the appropriate groups of agents for your supervisor teams. This change applies to both Lightning Experience and Salesforce Classic.

[**Use Triggers and Workflows Galore with Agent Work and User Service Presence**](#)

Use triggers and workflow rules with both Agent Work and User Service Presence. Plus, you get more customization and control through Omni-Channel setup in Salesforce Classic. This change applies to both Lightning Experience and Salesforce Classic.

[**Use Omni-Channel Console Methods and Events in Lightning Experience \(Generally Available\)**](#)

The Omni-Channel console methods that we introduced in Winter '18 are generally available. Plus, the Omni-Channel console events in the Salesforce Console Integration Toolkit have been repackaged and are available in the Lightning Console JavaScript API. So go ahead and give your Lightning Experience agents all the customized, productive goodness that your Salesforce Classic agents use and love.

[**Get More Done with Increased Routing Limits**](#)

We raised our limits to 30,000 work items per hour and 100,000 total queued work items, so your agents can make more customers happy. Previously, the limits were 15,000 work items per hour and 30,000 total queued items. This change applies to both Lightning Experience and Salesforce Classic.

Get the Right Work to the Right Agent, Right Away, with Skills-Based Routing (Beta)

Assign skills to your agents, and route work items to them based on their skill sets with skills-based routing (beta). You can use skills-based routing instead of queues as a more flexible way of routing cases and work items. Skills-based routing uses the Service Resource, Skill, and Pending Service Routing objects and is set up through the API. Contact Salesforce to enable skills-based routing for Omni-Channel. This change applies to both Lightning Experience and Salesforce Classic.

This release contains a beta version of skills-based routing, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. Skills-based routing isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any

particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for skills-based routing in the IdeaExchange group in the Trailblazer Community.

SEE ALSO:

[Salesforce Help: Skills-Based Routing \(Beta\) for Omni-Channel](#) (can be outdated or unavailable during release preview)

Use External Routing (Beta) in Lightning Experience

Your agents can handle externally routed work in Lightning Experience. Previously, agents had to use Salesforce Classic to accept external work items. External routing (Beta) lets you integrate an external routing implementation with Omni-Channel so your agents can receive work from any source, all in one console. Contact Salesforce to enable external routing for Omni-Channel. This change applies to Lightning Experience only.

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Monitor Your Support Center with Omni-Channel Supervisor in Lightning Experience (Generally Available)

Omni-Channel Supervisor is generally available in Lightning Experience. Omni-Channel Supervisor updates continuously to reflect the latest data, so you always know how your support center's doing. Information about your Omni-Channel agents, queues, and work is streamed live into the panel. Yes, you read that right: live. You see waiting times, open work, and more in real time. Plus, you can use the same compact layout functionality that you love in Salesforce Classic to display the details that matter most to your team.

And now, give your team the details they need most with compact layouts. Create a compact layout for the objects that your team handles to customize which details display in Omni-Channel Supervisor. Then assign your new layout as the primary compact layout for the object.

To provide all these insights to your supervisors, add Omni-Channel Supervisor to your Lightning Service Console as a selected item. Then make sure that your supervisors have access to it.

Keep the following considerations in mind when using Omni-Channel Supervisor in Lightning Experience.

- Omni-Channel settings, including settings for Omni-Channel Supervisor, are available only in Salesforce Classic.
- Hovering in the agent timeline isn't supported in Lightning Experience.
- Live Agent supervisor features aren't available in Omni-Channel Supervisor. Support supervisors can use Live Agent Supervisor in Salesforce Classic for chat monitoring features, even when agents are using Omni-Channel routing. Create a skill for agents handling chats routed with Omni-Channel. Their chats then appear in Live Agent Supervisor alongside chats routed with Live Agent routing.

Let Supervisors See Only What Matters in Omni-Channel Supervisor (Beta)

Your supervisors don't need to see every agent in the entire call center in the agent views. Get rid of the noise! Create supervisor configurations that filter the agent views to show the appropriate groups of agents for your supervisor teams. This change applies to both Lightning Experience and Salesforce Classic.

 **Note:** As a beta feature, Omni-Channel Supervisor configurations is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production.

use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Feature in the IdeaExchange in the Trailblazer Community.

When Omni-Channel Supervisor configurations are enabled for your org, you can use the Omni-Channel Supervisor Configuration (Beta) page in Salesforce Classic Setup to configure supervisor filtering. Assign supervisors to the configuration by adding the correct users and profiles. Then, specify the agents they can see by adding at least one public group containing the agents. This configuration applies only to filtering the agent view. Supervisors can still see all queues and work items in your org.

SEE ALSO:

[Create an Omni-Channel Supervisor Configuration \(Beta\)](#)

Use Triggers and Workflows Galore with Agent Work and User Service Presence

Use triggers and workflow rules with both Agent Work and User Service Presence. Plus, you get more customization and control through Omni-Channel setup in Salesforce Classic. This change applies to both Lightning Experience and Salesforce Classic.

Use Omni-Channel Console Methods and Events in Lightning Experience (Generally Available)

The Omni-Channel console methods that we introduced in Winter '18 are generally available. Plus, the Omni-Channel console events in the Salesforce Console Integration Toolkit have been repackaged and are available in the Lightning Console JavaScript API. So go ahead and give your Lightning Experience agents all the customized, productive goodness that your Salesforce Classic agents use and love.

SEE ALSO:

[Salesforce Console APIs](#)

Get More Done with Increased Routing Limits

We raised our limits to 30,000 work items per hour and 100,000 total queued work items, so your agents can make more customers happy. Previously, the limits were 15,000 work items per hour and 30,000 total queued items. This change applies to both Lightning Experience and Salesforce Classic.

Snap-Ins for Web: Pre-Chat Lightning Components, Direct-to-Button Routing, Automated Invitations, and More

Customize the pre-chat form and use direct-to-button routing, automated invitations, and sensitive data rules. If you use the Snap-ins Chat component in your community or Lightning Out (beta) to log in your customers, you can set some pre-chat fields to fill for them when they request a chat. There are some additional changes to Snap-ins setup and the code snippet. Upgrade your existing code snippets to version 4.0 to use the newest features.

Editions

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions

IN THIS SECTION:

[Customize Pre-Chat with Lightning Components](#)

Customize the fields, layout, buttons, images, validation, and any other part of the user interface for pre-chat using a custom Lightning component. This change applies to Lightning Experience only.

[Route Chats to a Button Based on Pre-Chat Responses](#)

Direct-to-button routing lets you get it right the first time and cut back on chat transfers between agents. Set your snap-in to route chats to different chat buttons based on the customer's pre-chat responses on any of your pre-chat fields. Let your imagination run wild. Upgrade your code snippet to version 4.0 to use direct-to-button routing. This change applies to both Lightning Experience and Salesforce Classic.

[Be Proactive with Automated Chat Invitations](#)

Connect an automated chat invitation with your Snap-ins deployment to proactively invite your customers to start a chat with an agent. Your invitation can slide, fade, or appear anywhere on the page based on the criteria you set. Use your own HTML and CSS to make the chat invitation match your company's branding. Upgrade your code snippet to version 4.0 to use invitations. This change applies to both Lightning Experience and Salesforce Classic.

[Fill In Pre-Chat Fields for Logged-In Visitors](#)

Why make your customers enter their name and email when they're already logged into your website? Whether your snap-in is in your Community or outside of Salesforce with Lightning Out (beta), you can set pre-chat fields to fill in automatically when they request a chat. Upgrade your code snippet to version 4.0 to use this feature. This change applies to both Lightning Experience and Salesforce Classic.

[Protect Customer Data Using Sensitive Data Rules](#)

It's great when your customers trust your agents to get the job done, but you might not want them to send sensitive information (like a credit card number) directly in a chat. Set rules to block specific patterns, so private information is omitted or replaced with selected characters in the chat transcript. This change applies to both Lightning Experience and Salesforce Classic.

[Keep Your Post-Chat Page in the Snap-In](#)

Whether you want to send customers to a particular web page or ask them for feedback after a chat, your post-chat URL opens inside the snap-in. Previously, the post-chat page opened in a new window. This change applies to both Lightning Experience and Salesforce Classic.

[Updates to Snap-Ins Setup and the Version 4.0 Code Snippet](#)

We made a few tweaks to Snap-ins Setup and the code snippet. We separated your snap-in settings from your chat-specific settings. The version 4.0 code snippet has a few new parameters. Upgrade your existing code snippets to use automated invitations, direct-to-button routing, and pre-filling fields on the pre-chat form for logged-in users. This change applies to Lightning Experience only.

Customize Pre-Chat with Lightning Components

Customize the fields, layout, buttons, images, validation, and any other part of the user interface for pre-chat using a custom Lightning component. This change applies to Lightning Experience only.

Head on over to the developer console and create a Lightning component that implements the new `lightningsnapin:prechatUI` interface. Then use the aura methods on the new `lightningsnapin:prechatAPI` component to create your custom pre-chat component.

- `getPrechatFields` returns the pre-chat fields that you defined in Snap-ins setup.
- `validateFields` returns an object with information about whether the pre-chat fields are valid for starting a chat and details for any invalid fields.
- `startChat` sends a chat request that includes the pre-chat field values.

Route Chats to a Button Based on Pre-Chat Responses

Direct-to-button routing lets you get it right the first time and cut back on chat transfers between agents. Set your snap-in to route chats to different chat buttons based on the customer's pre-chat responses on any of your pre-chat fields. Let your imagination run wild. Upgrade your code snippet to version 4.0 to use direct-to-button routing. This change applies to both Lightning Experience and Salesforce Classic.

You can set a specific chat button for each option in a picklist or even for certain keywords in text fields. For example, if your customer chooses "Laptop" from a picklist, send the chat request to a button that's linked to the "Laptop" agent skill or Omni-Channel queue. Similarly, if your customer describes their reason for requesting a chat in a text field, and enters "laptop", route the chat to your "Laptop" agents.

When you generate a new 4.0 code snippet, the function for direct-to-button routing is available in a code comment.

```
embedded_svc.settings.directToButtonRouting = function(prechatFormData) {  
    // Dynamically changes the button ID based on what the visitor enters in the pre-chat form.  
  
    // Returns a valid button ID.  
};
```

Be Proactive with Automated Chat Invitations

Connect an automated chat invitation with your Snap-ins deployment to proactively invite your customers to start a chat with an agent. Your invitation can slide, fade, or appear anywhere on the page based on the criteria you set. Use your own HTML and CSS to make the chat invitation match your company's branding. Upgrade your code snippet to version 4.0 to use invitations. This change applies to both Lightning Experience and Salesforce Classic.

Trigger the invitation based on criteria like how long a customer is viewing a particular page, or when a customer's shopping cart reaches a certain amount. When the customer requests a chat with the invitation, the snap-in goes to its usual place on the screen.

Create invitations in Salesforce Classic Setup. Enter *Chat Button* in the Quick Find box and select **Chat Buttons & Invitations**.

Make sure that your invitation is marked active and is connected to the Live Agent deployment that your snap-in uses. Then, override the JavaScript functions for invitations in your 4.0 snap-ins code snippet (they're included for you as code comments) and customize the HTML and CSS.

Invitations work a little differently in Snap-ins Chat versus Live Agent:

- Position and animation don't apply to customers using a mobile browser. They see the invitation above the snap-in with the "fade" animation type.
- Custom animations aren't supported.
- The same fields that aren't supported for Snap-ins chat buttons aren't supported for Snap-ins invitations: Pre-Chat Form Page, Pre-Chat Form URL, Custom Chat Page, Invitation Image, and Site for Resources.

Fill In Pre-Chat Fields for Logged-In Visitors

Why make your customers enter their name and email when they're already logged into your website? Whether your snap-in is in your Community or outside of Salesforce with Lightning Out (beta), you can set pre-chat fields to fill in automatically when they request a chat. Upgrade your code snippet to version 4.0 to use this feature. This change applies to both Lightning Experience and Salesforce Classic.

When you use the Snap-ins Chat component in your Community, set the contact fields in the pre-chat form to fill in for customers automatically. Select **Fill in pre-chat fields**, and the First Name, Last Name, and Email fields are filled in when logged-in customers request a chat.

Snap-Ins Chat

The chat window is always in the bottom-right of the page.

Chat Deployment

Bluth_Community_Chat

Display chat button

Fill in pre-chat fields

Button Label

Chat with an Expert

Offline Button Label

Agent Offline

Chat Waiting Message

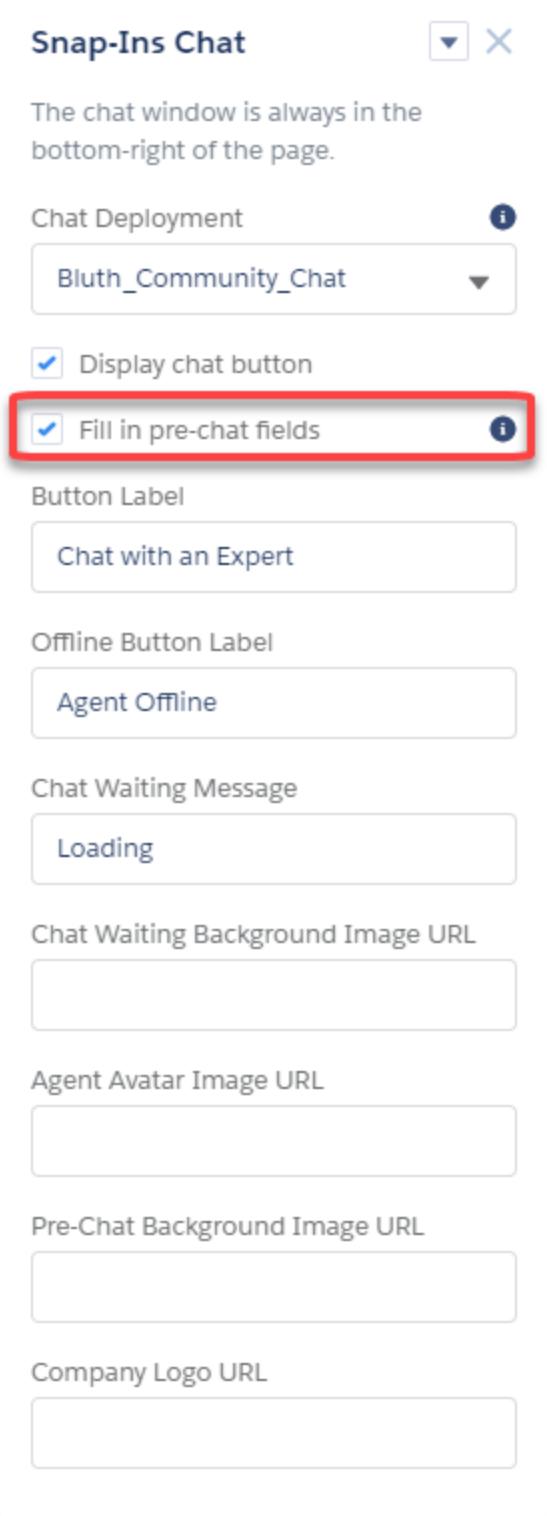
Loading

Chat Waiting Background Image URL

Agent Avatar Image URL

Pre-Chat Background Image URL

Company Logo URL



If you use snap-ins outside of Salesforce, set any pre-chat field to fill in automatically in the Snap-ins code snippet. With the 4.0 snippet, we've included a line in the code for you to customize.

```
embedded_svc.settings.prepopulatedPrechtaFields = {...}; //Sets the auto-population of pre-chat form fields
```

Protect Customer Data Using Sensitive Data Rules

It's great when your customers trust your agents to get the job done, but you might not want them to send sensitive information (like a credit card number) directly in a chat. Set rules to block specific patterns, so private information is omitted or replaced with selected characters in the chat transcript. This change applies to both Lightning Experience and Salesforce Classic.

Set up sensitive data rules in Salesforce Classic Setup (and make sure that your code snippet is version 2.0 or later). Enter *Sensitive Data Rules* in the Quick Find box and select **Sensitive Data Rules**. Recommendations and limitations for Live Agent also apply to Snap-ins Chat.

SEE ALSO:

[Salesforce Help: Block Sensitive Data in Chats \(can be outdated or unavailable during release preview\)](#)

Keep Your Post-Chat Page in the Snap-In

Whether you want to send customers to a particular web page or ask them for feedback after a chat, your post-chat URL opens inside the snap-in. Previously, the post-chat page opened in a new window. This change applies to both Lightning Experience and Salesforce Classic.

Make sure that the protocol in your post-chat URL matches the pages where you place the snap-in. For example, your post-chat URL must start with `https://` if the web page with your snap-in starts with `https://`.

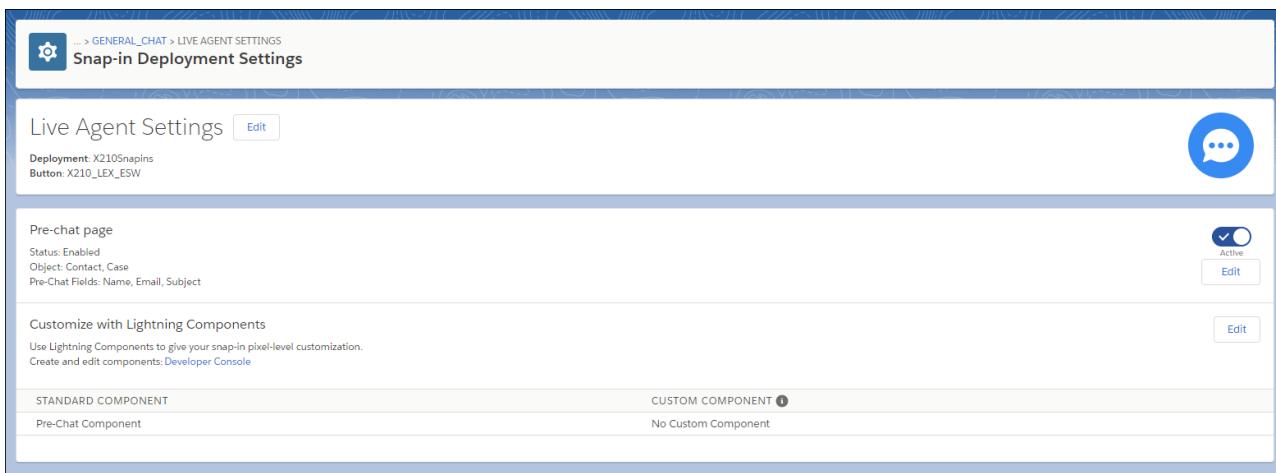
Updates to Snap-Ins Setup and the Version 4.0 Code Snippet

We made a few tweaks to Snap-ins Setup and the code snippet. We separated your snap-in settings from your chat-specific settings. The version 4.0 code snippet has a few new parameters. Upgrade your existing code snippets to use automated invitations, direct-to-button routing, and pre-filling fields on the pre-chat form for logged-in users. This change applies to Lightning Experience only.

The Snap-ins setup experience is making room for more customization. The deployment settings view is streamlined. It lets you set your branding and get your code snippet or drill down to your Snap-ins Chat settings.



Your chat settings are all grouped under Live Agent Settings, so you can control your Live Agent selections, pre-chat page, and Lightning Components all in one place. Ooh la la!



Whenever you create a new deployment, you'll notice that the version 4.0 code snippet looks a bit different. Make sure to update your existing code snippets to use the newest features.

Here's what changed in the code snippet for version 4.0:

- Added the `embedded_svc.settings.directToButtonRouting` parameter as a code comment to let you set direct-to-button routing.
- Added the `embedded_svc.settings.prepopulatedPreChatFields` parameter as a code comment to let you set pre-chat fields to auto-fill for customers logged in through Lightning Out (beta).
- Added invitations functionality. When you generate a 4.0 snippet for a deployment with an invitation, we include the generic HTML and CSS for you. To customize the functionality of the Start Chat and Close buttons, override the `embedded_svc.inviteAPI.inviteButton.acceptInvite()` and `embedded_svc.inviteAPI.inviteButton.rejectInvite()` JavaScript functions.

Snap-Ins for Mobile Apps: SDK Enhancements

We're hard at work improving the Snap-ins SDKs for Android and iOS. Map fields in your app's pre-chat form to fields in a record in your org. Customize Knowledge articles with your own JavaScript or CSS. We also support the latest hardware and software: iPhone X, iOS 11, and Android O.

Visit the [Snap-Ins for Mobile Apps](#) site for more information.

EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Entitlement Management: View Work Order Milestones in Lightning Experience

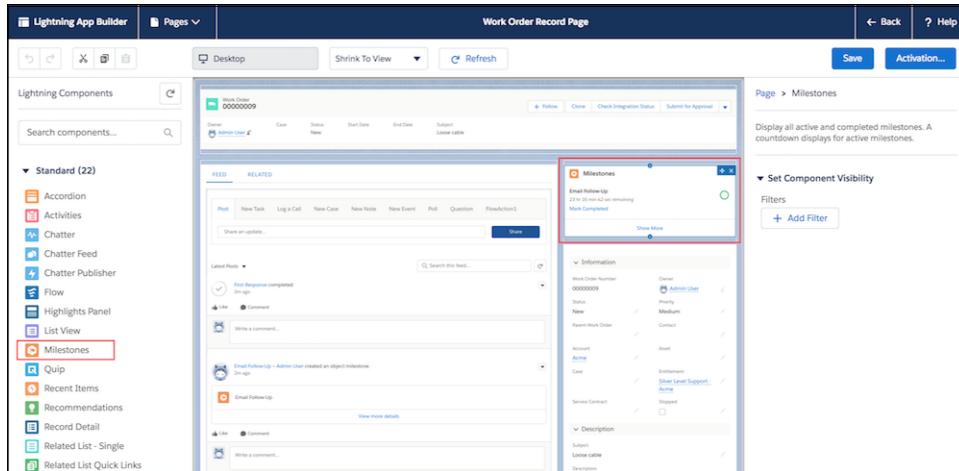
Agents can now see past, current, and upcoming milestones on work orders in Lightning Experience. View countdowns on remaining milestones and mark milestones complete in the redesigned milestone tracker.

You can manage work order milestone fields, triggers, layouts, and more from the Object Manager in Setup. Just look for Object Milestones.

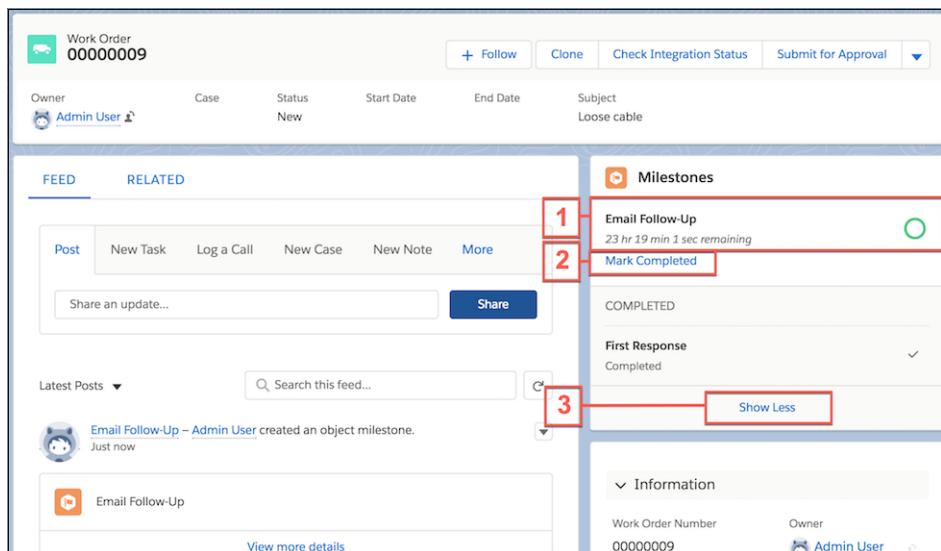
To let your agents see work order milestones, head over to the Lightning App Builder and drag the Milestones component anywhere onto your work order record page.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud



When an entitlement process starts on a work order, a feed item is generated for each milestone in the process to indicate that a milestone was added to the work order.



Just like in Salesforce Classic, the Lightning Experience milestone tracker on work orders includes:

- View of active milestones with a color-coded countdown (1)
- **Mark Completed** link for each milestone (2)
- Link to display or hide additional milestones (3)

 **Note:** In the Object Milestones related list on work orders in Lightning Experience, only these fields are supported:

- Completion Date
- Created By
- Created Date
- Deleted
- Elapsed Time (Mins)
- Last Modified By
- Last Modified Date

- Object Milestone ID
- Object Milestone Name
- Parent Object
- Stopped Time (Mins)
- Target Date

If you're new to entitlement management, check out the following resources to get started.

- [Entitlements and Milestones](#) in Salesforce Help
- [Entitlement Management module](#) in Trailhead

Social Customer Service: Learn More About Your Customers with the Conversations Component

Social Customer Service offers even more customer information in the conversations component! Improvements like customer sentiment and social media status (to name a few) offer more customer visibility than ever before. Other updates include a collapsible sidebar, code-free business rules, automated social case routing, and Apex threading modifications..

Just look at all the great customer information (and functionality!) in the social conversations component.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The screenshot shows the Social Conversations interface. At the top, a customer profile for "Pete Mitchell" (@goosesmaverick) is displayed, including follower counts and an Influencer Score. A red box labeled "1" highlights the Influencer Score area. Below the profile, a bio message is shown: "Buzzing towers and keeping up foreign relations".

Underneath the bio, "Author Labels" are listed: MAVERICK, TOWER BUZZER, and VIP. A red box labeled "2" highlights the "TOWER BUZZER" label. Further down, "Sentiment: Positive" is indicated with a smiley face icon, and "Total Posts: 26" is shown. A red box labeled "3" highlights the "Positive" sentiment.

A "Show Less" link is present. Below this, a collapsed case section for "Twitter | goosesmaverick | @CliffCorp M..." is shown, with a red box labeled "4" highlighting the "Case Number" field containing "00002506".

The expanded case view shows a conversation between "@goosesmaverick" (CUSTOMER) and "Eddie Cliff (@CliffCorp)". The customer message is: "@CliffCorp Ok perfect, that's still plenty to buzz the tower!". Eddie Cliff's response is: "@goosesmaverick Hi Pete, yes, 4 Gs is the maximum rating for that specific class of aircraft!". Both messages are timestamped at "12/7/2017, 2:39 PM" and "12/7/2017, 2:38 PM" respectively.

- See Your Customer's Verified Status and Social Persona (1):** Now you can see if you're chatting with a verified user. Verified means that Facebook or Twitter has confirmed the brand, business, or public figure's identity. The customer's Social Persona, including followers, Twitter bio, and Influencer Score are also available. This change applies to Lightning Experience only.
- Learn More About Your Customers with Author Labels (2):** Author labels help you better understand your customer. For example, see if your customer is an Expert or a VIP. Customize author labels to suit your business needs. This change applies to Lightning Experience only.
- Keep the Conversation Cool with Sentiment Temperatures (3):** Is your customer feeling positive, negative, or neutral? Check the sentiment temperature before jumping into the next conversation. This change applies to Lightning Experience only.
- Change the View with Expanded and Collapsed Cases (4):** Want to get more details about a particular social media case? Open a social conversation to view recent posts at the top, with first post and parents posts at the bottom. Collapse the conversation to see more of your existing cases. This change applies to Lightning Experience only.

IN THIS SECTION:

[Speed Things Along with Quick Text in Your Social Posts](#)

No more retyping. And retyping. And retyping. Use quick text in the social publisher to add frequently used responses to your social cases. This change applies to Lightning Experience only.

[Add Notes to Social Posts](#)

Use the new note field to add notes to the social persona. Notes added in Social Studio or Social Automate appear on the Social Post Note field, giving agents a well-rounded view of the post. This change applies to Lightning Experience only.

[Subtract the Twitter Handle from Your Character Count](#)

Pack more prose into those responses! Agents can tweet customers without the company Twitter handle as part of the character count. This change applies to Lightning Experience only.

[Use Social Persona Threading Updates in Apex](#)

To provide a more intuitive agent experience and more efficient searches, Apex's default behavior is to find existing cases based on Persona. Previously, Apex relied on threading *replyToId*. We also updated *findParentCase* to use *findParentCaseFromPersona*. This change applies to Salesforce Classic and Lightning Experience.

[Define Case Rules and Routing Without Using Apex](#)

Use rules to define how new cases originating on social media are assigned and routed to agents. Rule-based routing eliminates manually routing cases or using custom Apex. And in addition, it takes just a checkbox in Setup. Create case assignment rules using clicks, not code, to quickly resolve cases. This change applies to Salesforce Classic and Lightning Experience.

[Use Social Customer Service with the Professional Edition](#)

Social Customer Service is available in all existing Professional Edition orgs. This change applies to Salesforce Classic and Lightning Experience.

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Use Social Customer Service with the Professional Edition

Social Customer Service is available in all existing Professional Edition orgs. This change applies to Salesforce Classic and Lightning Experience.

CTI: The VF Component support:clickToDial Now Works in Lightning Experience

If you have Visualforce embedded in your app with legacy click-to-dial, you can add items such as clickable phone numbers. Helpful with your existing CTI implementations.

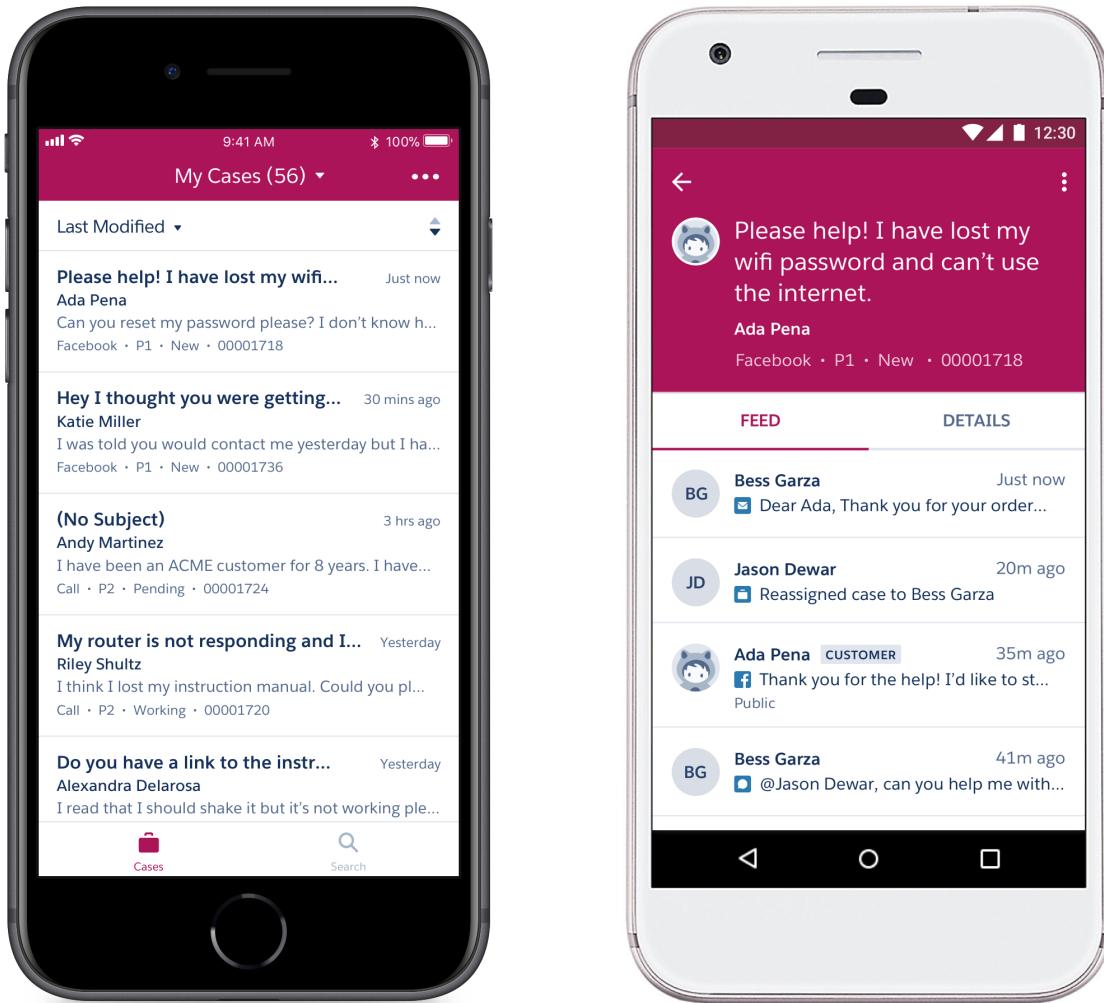
This component renders a valid phone number as click-to-dial enabled for Open CTI for Salesforce Classic, Lightning Experience, or Salesforce CRM Call Center. This field respects any existing click-to-dial commands for computer-telephony integrations (CTI) with Salesforce. It works with the following methods for Lightning Experience: enableClickToDial(), disableClickToDial(), and onClickToDial()

Service Cloud Mobile (Pilot)

All the case management features you love from Service Cloud are coming to your mobile device! Manage case lists and queues. Update, edit, and collaborate on cases. Communicate via email, Facebook, and Twitter. Execute bulk actions. Search contact and account details. Available for both Android and iOS mobile devices.

To participate in the pilot, follow the links below. Android users can download the app immediately from the Play Store, while iOS users can sign up for the pilot.

- Android: <https://play.google.com/apps/testing/com.salesforce.service.lightning>
- iOS: <https://sfdc.co/servicemobileios>



Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

IN THIS SECTION:

[Removed Personal Data from Web-to-Case and Web-to-Lead Emails](#)

To help you comply with various data protection and privacy regulations, we updated our emails sent to you when Web-to-Case or Web-to-Lead fails. Emails no longer include personal data that was inserted by third-party packages. This change applies to both Lightning Experience and Salesforce Classic.

[View a Person Account's Assets in Lightning Experience](#)

In Lightning Experience, the Assets related list on person accounts now displays all assets related to the person account. Previously, if the Contact field on an asset listed a person account, the asset didn't appear in the Assets related list on the person account in Lightning Experience.

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To help you comply with various data protection and privacy regulations, we updated our emails sent to you when Web-to-Case or Web-to-Lead fails. Emails no longer include personal data that was inserted by third-party packages. This change applies to both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

View a Person Account's Assets in Lightning Experience

In Lightning Experience, the Assets related list on person accounts now displays all assets related to the person account. Previously, if the Contact field on an asset listed a person account, the asset didn't appear in the Assets related list on the person account in Lightning Experience.

Analytics: Reports and Dashboards and Einstein Analytics

Powerful and familiar features grace the second beta release of the Lightning report builder: bucket columns, cross filters, and summary formulas. Subscribe to Lightning Experience dashboards, and give them a splash of color. Help users get started in Einstein Analytics with integrated and fun learning features. Quickly query and visualize data in a guided, natural language conversation (beta). Save views of dashboards that you've set up with your preferred selections and filters. Have Einstein analyze your report data with Einstein Data Insights (pilot).

IN THIS SECTION:

[Reports and Dashboards: Lightning Experience Report Builder \(Beta\), Dashboard Colors, Dashboard Subscriptions](#)

The second beta release of the Lightning Experience report builder features buckets, cross filters, and summary formulas. Dashboards feature color themes and palettes, Lightning tables are generally available, and you can subscribe to dashboards.

[Einstein Analytics: Learning Adventures, Conversational Exploration, Einstein Data Insights](#)

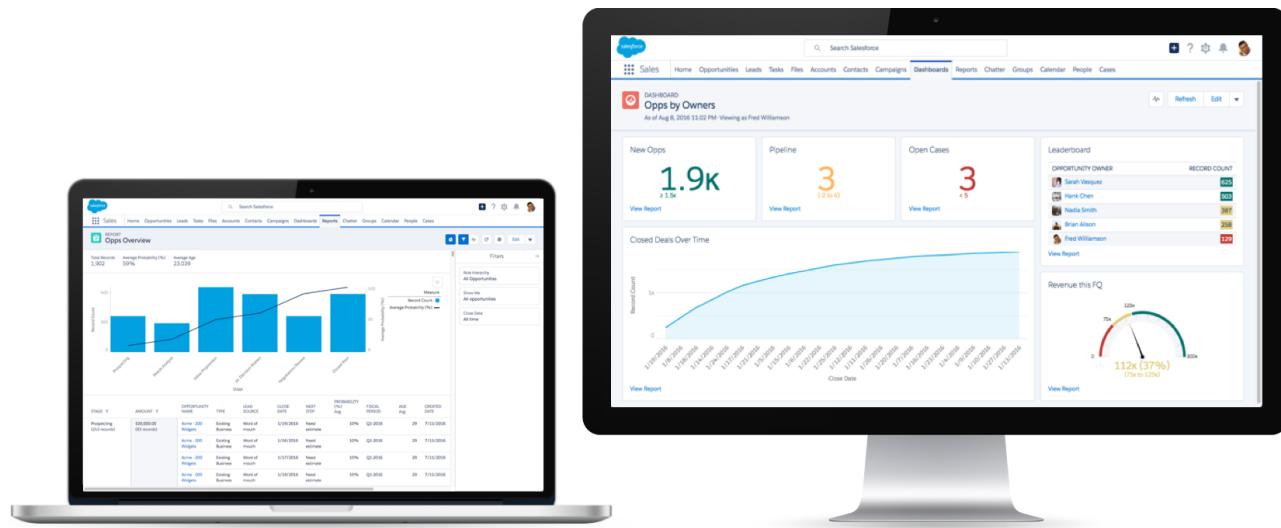
Help users get started in Einstein Analytics with integrated and fun learning features. Quickly query and visualize data in a guided, natural language conversation (beta). Build charts more easily with the power to specify which field to use for each chart feature. Save views of dashboards that you've set up with your preferred selections and filters. Have Einstein analyze your report data with the pilot launch of Einstein Insights.

Reports and Dashboards: Lightning Experience Report Builder (Beta), Dashboard Colors, Dashboard Subscriptions

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IN THIS SECTION:

[Lightning Experience Report Builder: Buckets, Cross Filters, and Summary Formulas \(Beta\)](#)

The second beta release of the Lightning Experience report builder lets you categorize report data with buckets, include or exclude results from related objects with cross filters, and summarize data in new ways with summary formula columns. These changes apply to Lightning Experience only.

[Dashboards: Better Tables, Subscriptions, and New Design Options](#)

Dashboards are the best way to collect, curate, and collaborate on data from one or more reports. Add Lightning dashboard tables to provide record-level details in your dashboards. Subscribe to dashboards to refresh them on a schedule that you set, and receive results by email. Dress up your dashboards by customizing chart colors and background themes. Don't forget to share insights using improved share-on-Chatter options! These changes apply to Lightning Experience only.

[Folders: Find and Favorite](#)

Folders are key to organizing and sharing reports and dashboards. Now, you can find report and dashboard folders using Salesforce search. And once you find the folder you're looking for, favorite it for easy access later. These changes apply to Lightning Experience only.

[Chart Enhancements for Reports and Dashboards in Lightning Experience](#)

Visualizing business data is understanding business data, so we've improved charts to help you see it better. These changes apply to Lightning Experience only.

Lightning Experience Report Builder: Buckets, Cross Filters, and Summary Formulas (Beta)

The second beta release of the Lightning Experience report builder lets you categorize report data with buckets, include or exclude results from related objects with cross filters, and summarize data in new ways with summary formula columns. These changes apply to Lightning Experience only.



Note: This release contains a beta version of Lightning Experience report builder, which means it's a high-quality feature with known limitations. Lightning Experience report builder isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

IN THIS SECTION:

[Categorize Data with Bucket Columns](#)

Quickly categorize report records without creating a formula or a custom field by *bucketing* them. When you create a bucket column, you define multiple categories (buckets) used to group report values. Like any other column in your report, you can sort, filter, and group by bucket columns. This feature is new in Lightning Experience.

[Filter Across Objects with Cross Filters](#)

Include or exclude records in your report results based on related objects and their fields. This feature is new in Lightning Experience.

[Evaluate Report Data with Summary Formulas](#)

Use summary formulas to logically evaluate and do math with report results. This feature is new in Lightning Experience.

[Edit Report Properties](#)

From the Report Properties menu, you can rename, change the description, or move your report to another folder. This feature is new in Lightning Experience.

[Filter by Role Hierarchy](#)

Previously, in Lightning Experience, you could filter by role hierarchy while viewing a report, but not while editing. Now, in the Lightning Experience report builder, you can filter by role hierarchy. This feature is new in Lightning Experience.

[Other Enhancements to Reports in Lightning Experience](#)

In addition to this release's major features, we've made some small-but-notable improvements to reports. These changes apply to Lightning Experience only.

[Lightning Experience Report Builder Feature Differences and Gaps](#)

As you get ready to build reports with the Lightning Experience report builder, take note of how it differs from the Salesforce Classic report builder. Remember, user permissions allowing, both builders are available in Lightning Experience. If a feature or tool isn't available in one builder, save your report and edit it in the other.

Categorize Data with Bucket Columns

Quickly categorize report records without creating a formula or a custom field by *bucketing* them. When you create a bucket column, you define multiple categories (buckets) used to group report values. Like any other column in your report, you can sort, filter, and group by bucket columns. This feature is new in Lightning Experience.

For example, create a bucket column named Size based on the # Employees column. Then, create buckets that group records into "Large," "Medium," or "Small" ranges that you define.

The screenshot shows the Salesforce Lightning Experience Report Builder. On the left, there's a sidebar titled 'Fields' with sections for 'Groups' (containing 'GROUP ROWS' and 'Add group...'), 'Columns' (containing 'Add column...', 'Opportunity Owner', 'Account Name', '# Employees', '# Amount', '# Probability (%)', 'Type', 'Stage', and 'Industry'), and a 'Filters' section with a count of 5. The main area displays a report preview with 20 rows of data. The columns are: Opportunity Owner, Account Name, Employees, Amount, Probability (%), Type, Stage, and Industry. The data includes various names like Hank Chen, Nadia Smith, and Fred Williamson, along with account names like Global Media and Acme, and industry names like Media and Manufacturing.

	Opportunity Owner	Account Name	Employees	Amount	Probability (%)	Type	Stage	Industry
1	Hank Chen	Global Media	14,668	\$70,000.00	10%	Existing Business	Prospecting	Media
2	Nadia Smith	Acme	680	\$500,000.00	90%	New Business	Negotiation/Review	Manufacturing
3	Nadia Smith	Acme	680	\$50,000.00	50%	Existing Business	Value Proposition	Manufacturing
4	Brian Alison	Acme	680	\$40,000.00	60%	Existing Business	Id. Decision Makers	Manufacturing
5	Fred Williamson	Global Media	14,668	\$20,000.00	60%	New Business	Id. Decision Makers	Media
6	Sarah Vasquez	Global Media	14,668	\$100,000.00	50%	Existing Business	Value Proposition	Media
7	Sarah Vasquez	Global Media	14,668	\$20,000.00	20%	New Business	Needs Analysis	Media
8	Sarah Vasquez	Acme	680	\$70,000.00	10%	Existing Business	Prospecting	Manufacturing
9	Sarah Vasquez	Acme	680	\$500,000.00	90%	New Business	Negotiation/Review	Manufacturing
10	Sarah Vasquez	Global Retail	10,000	\$50,000.00	50%	Existing Business	Value Proposition	Retail
11	Hank Chen	Global Retail	10,000	\$40,000.00	60%	Existing Business	Id. Decision Makers	Retail
12	Hank Chen	Global Media	14,668	\$70,000.00	100%	Existing Business	Closed Won	Media
13	Hank Chen	Global Retail	10,000	\$20,000.00	60%	New Business	Id. Decision Makers	Retail
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15	Brian Alison	Acme	680	\$20,000.00	60%	Existing Business	Id. Decision Makers	Manufacturing
16	Brian Alison	Acme	680	\$100,000.00	100%	New Business	Closed Won	Manufacturing
17	Brian Alison	Acme	680	\$20,000.00	100%	Existing Business	Closed Won	Manufacturing
18	Brian Alison	Global Retail	10,000	\$50,000.00	20%	New Business	Needs Analysis	Retail
19	Fred Williamson	Global Retail	10,000	\$40,000.00	10%	Existing Business	Prospecting	Retail
20	Sarah Vasquez	Global Media	14,668	\$140,000.00	90%	New Business	Negotiation/Review	Media

Add a bucket column while editing a report.

- Find the column you want to bucket in the report preview, then click > **Bucket This Column**.
- From the Edit Bucket Column menu, add buckets and choose values for each bucket.
- Click Apply.

Your new bucket column appears in the report preview and in the Columns section. To edit the bucket column, find the column in the report preview and click > **Edit Bucket Column**. To delete the bucket column, click > **Delete Bucket Column**.

Filter Across Objects with Cross Filters

Include or exclude records in your report results based on related objects and their fields. This feature is new in Lightning Experience.

To see which accounts have escalated cases, add a cross filter. Set the cross filter to show accounts with cases that have status equals escalated.

The screenshot shows the Salesforce Lightning Experience Report Builder. At the top, there's a navigation bar with icons for Home, Reports, Dashboards, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Chatter, Groups, and More. Below the navigation is a search bar labeled 'Search Salesforce'. The main area displays a report titled 'Accounts with Escalated Cases' under the 'ACCOUNTS' tab. On the left, there's a sidebar with sections for 'OUTLINE' and 'FILTERS'. The 'FILTERS' section has a dropdown menu with options like 'Add filter...', 'Show Me All accounts', and 'Created Date All Time'. The report preview shows a table with columns: Account Owner, Account Name, Billing State/Province, Billing City, Type, and Industry. The data in the table is as follows:

	Account Owner	Account Name	Billing State/Province	Billing City	Type	Industry
1	Fred Williamson	Acme	NY	New York	Prospect	Manufacturing
2	Fred Williamson	salesforce.com	CA	San Francisco	Customer	Technology
3	Fred Williamson	Global Media	Ontario	Toronto	Prospect	Media
4	Fred Williamson	Global Retail	-	-	Customer	Retail
5						

Add a cross filter while editing a report.

1. From FILTERS, click > **Add Cross Filter**.
2. Choose whether to show your primary object **with** or **without** a secondary object. Then, choose the secondary object.
3. Click **Apply**.
4. Optionally, to add a filter to the secondary object, click **Add Secondary Object Filter**, where *Secondary Object* is the name of the secondary object.
 - a. Choose a field from the secondary object.
 - b. Specify an operator and values for the secondary object filter.
 - c. Click **Apply**.

The report filters to show only primary objects with (or without) secondary objects and any additional filters on the secondary object.

As you add cross filters to your reports, take note of these limits and considerations:

- Each report can have up to 3 cross filters.
- Each cross filter can have up to 5 subfilters.
- Filter logic doesn't apply to cross filters.

Note: Although cross filters still filter the report, they do not appear in the Filters panel on the report run page. If you have permission to edit a report, you can view cross filters in the report builder.

Evaluate Report Data with Summary Formulas

Use summary formulas to logically evaluate and do math with report results. This feature is new in Lightning Experience.

To see the total value of closed opportunities in a report, summarize the amount column. But what if you want to see total value after tax, and what if earnings are taxed at a progressive rate? (Say, 15% on sales below \$1,000,000, and 20% on sales above \$1,000,000.) Add

a summary formula column named “Amount After Tax” to your report and write a formula like this one to evaluate the existing Amount column:

```
IF(AMOUNT:SUM < 1000000, AMOUNT:SUM * (1 - 0.15), AMOUNT:SUM * (1 - 0.20))
```

Now you can easily incorporate after-tax earnings into fiscal quarter planning.

The screenshot shows the Salesforce Lightning Experience Report Builder. The top navigation bar includes Sales, Home, Reports, Dashboards, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Chatter, Groups, More, and a Run button. The main area is titled "Sales Summary" and shows a table of data with various columns: Industry, Account Name, Employees, Probability (%), Type, Stage, and Amount. The data is grouped by Industry (Manufacturing, Media, Retail) and Stage (Prospecting, Negotiation/Review, Value Proposition, Needs Analysis, Closed Won). A sidebar on the left titled "Fields" contains sections for "Groups" (with "Add group..." and "Industry" options) and "Columns" (with "Add column...", "Account Name", "# Employees", "# Probability (%)", "Type", "Stage", and "# Amount" options). The bottom of the table has checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked.

Before adding a summary formula to your report, be sure to group report data. Summary formula columns require at least one group.

1. Edit or create a report.
2. If necessary, group report data. From the Groups section, select a field from the **Add group...** lookup menu under GROUP ROWS.
3. From the Columns section, click > **Add Summary Formula Column**.
4. Optionally, to open the full editor, click **Switch to Full Editor**.
5. Enter a summary formula. For example:

```
IF(AMOUNT:SUM < 1000000, AMOUNT:SUM * (1 - 0.15), AMOUNT:SUM * (1 - 0.20))
```

6. To see if your formula contains errors, click **Check Syntax**. Resolve any errors.
7. Optionally, click **FORMAT** to choose how to format results, how many decimal points to show, and to change where the formula gets applied.
8. Click **Apply**.

The summary formula appears as a new column in your report.

To edit a formula column, find it in the Formula Columns section and click its name.

To remove a summary formula column from a report, find the column in the report preview and click > **Remove Column**.

To delete a summary formula column, find it in the Formula Columns section and click **X**. Deleting a summary formula column is permanent. To get it back, you'll have to recreate it from scratch.

As you prepare to add summary formula columns to your report, take note of these considerations:

- You can't group report data by summary formula columns.
- You can't filter report data by summary formula columns.
- You can't reorder summary formula columns.
- Summary formula columns require at least one group.

Edit Report Properties

From the Report Properties menu, you can rename, change the description, or move your report to another folder. This feature is new in Lightning Experience.

Previously, you could only open the Report Properties menu from the Salesforce Classic report builder. Now, you can open it in the Lightning Experience report builder.

To open the properties menu, edit a report, then click  > **Properties**.

Filter by Role Hierarchy

Previously, in Lightning Experience, you could filter by role hierarchy while viewing a report, but not while editing. Now, in the Lightning Experience report builder, you can filter by role hierarchy. This feature is new in Lightning Experience.

To filter by role hierarchy, first edit a report. Then, from FILTERS, click **Show Me** and filter by role.

Other Enhancements to Reports in Lightning Experience

In addition to this release's major features, we've made some small-but-notable improvements to reports. These changes apply to Lightning Experience only.

When Copying a Report, "Clone" is now "Save As"

Previously, to make a copy of a report, you clicked **Clone**. Now, to make a copy, click **Save As**. The Save As dialog now features three radio buttons.

- **Make Private**—Save the copied report in Private Reports.
- **Make Public**—Save the copied report in Public Reports.
- **Move into Folder**—Save the copied report in a report folder of your choice.

Some Areas in the Report Builder Are a Little Less Blue

In fact, they're gray. Previously, parts of the report builder, such as the field headings, were shaded blue. The run-report page's coloring remains unchanged.

"No Results" Message in the Report Builder Features a New Image

When a report returns no results, a new image appears in the report preview. Don't worry. Astro is still there!

Double-Click a Field to Add as a Report Column

In the report builder, double-click a field from the fields pane to add it as a column.

Time Fields Display as Times in Reports

Previously, time fields displayed as numbers. Now, the time value is formatted like a time.

Get Help Finding Fields

When your search for a field in a Lookup returns no results, you can now display all available fields. To see available fields, click **Show all fields** in the "no fields found" message.

Lightning Experience Report Builder Feature Differences and Gaps

As you get ready to build reports with the Lightning Experience report builder, take note of how it differs from the Salesforce Classic report builder. Remember, user permissions allowing, both builders are available in Lightning Experience. If a feature or tool isn't available in one builder, save your report and edit it in the other.

Differences Between the Lightning Experience and Salesforce Classic Report Builders

Feature	Difference
Report Formats	<p>In the Salesforce Classic report builder, you must choose a report format before grouping data.</p> <p>In the Lightning report builder, the report format automatically updates as you group report data. Tabular, summary, and matrix reports are all available, but you don't select the format before grouping the data.</p>
Charts	The Lightning Experience report builder features the same charts as the report-view-page in Lightning Experience.
Customizing Granularity when Grouping by Date Fields	<p>In the Lightning Experience When grouping records by a date field, you can't customize date granularity.</p> <p>For example, on the Opportunity report type, grouping by the Date Closed field always groups records by day, and Month Closed always groups records by month.</p>

Features Not Available in the Lightning Experience Report Builder

These features aren't available in the beta version of the Lightning report builder, but we're working hard to implement them in a future release.

- Joined reports
- Row limit filters
- Dashboard Settings menu

Dashboards: Better Tables, Subscriptions, and New Design Options

Dashboards are the best way to collect, curate, and collaborate on data from one or more reports. Add Lightning dashboard tables to provide record-level details in your dashboards. Subscribe to dashboards to refresh them on a schedule that you set, and receive results by email. Dress up your dashboards by customizing chart colors and background themes. Don't forget to share insights using improved share-on-Chatter options! These changes apply to Lightning Experience only.

IN THIS SECTION:

[Add Tables with Up to 10 Columns to Dashboards \(Generally Available\)](#)

The Lightning dashboard table, a new dashboard table component, shows up to 200 records and 10 columns from the fields available in a source report's report type. Because the available fields come from the source report's report type, the columns shown in a Lightning dashboard table don't need to be added to the source report as columns. Add a Lightning dashboard table to supplement chart and metric-based overviews with record-by-record details. This feature is new in Lightning Experience.

[Subscribe to Dashboards to Schedule Refreshes and Get Email Updates](#)

It's Monday morning, and you're racing to the office. You have a meeting at 8:00 AM and must refresh the Sales Pipeline dashboard so you can present about quarterly goals. It's a good thing you subscribed to the Sales Pipeline dashboard and scheduled automatic dashboard refreshes each Monday at 8:00 AM. Your phone buzzes. Looks like you just received an up-to-date version of Sales Pipeline dashboard by email. Open it up and give it a quick review. You're ready to present! This feature is new in Lightning Experience.

[Color Your Dashboard Data with Themes and Palettes](#)

Customize colors in your dashboard by choosing a light or dark theme and one of 14 color palettes. Themes and color palettes help you organize and curate data in your dashboard. For example, call attention to a set of summary metrics by giving them a dark theme and setting them against a light-themed dashboard. This feature is new in Lightning Experience.

[Improved Experience for Sharing Dashboard Components on Chatter](#)

Sharing a dashboard component on Chatter now matches the share-on-Chatter experience across Salesforce. Previously, you chose to post an image of a dashboard component to either the dashboard feed, your feed, or a group feed. You couldn't @mention anyone and you couldn't format your post with rich text features like **bold** and *italics*. Now, you always post to the dashboard feed, @mention people and groups, and format with rich text like you can on other feeds. (So, go ahead and make your post as **bold** as you like!) Plus, you can review the dashboard feed while you're sharing a component! This feature is new in Lightning Experience.

[Other Enhancements to Dashboards in Lightning Experience](#)

In addition to this release's major features, we've made some small-but-notable improvements to dashboards. These changes apply to Lightning Experience only.

Add Tables with Up to 10 Columns to Dashboards (Generally Available)

The Lightning dashboard table, a new dashboard table component, shows up to 200 records and 10 columns from the fields available in a source report's report type. Because the available fields come from the source report's report type, the columns shown in a Lightning dashboard table don't need to be added to the source report as columns. Add a Lightning dashboard table to supplement chart and metric-based overviews with record-by-record details. This feature is new in Lightning Experience.

The screenshot displays the Salesforce Sales Overview dashboard. At the top, there's a header bar with a dashboard icon, the title "Sales Overview", and navigation buttons for Follow, Refresh, Edit, and a dropdown menu. Below the header, the dashboard is divided into several sections:

- Opportunity Count:** A large green summary metric showing "1,876". Below it is a link to "View Report [Opp Overview]".
- Opps Over Time:** A chart titled "Fiscal Period" showing "Average Age" and "Record Count" over time. It includes a legend and a link to "View Report [Opp Overview]".
- Sum of Amount:** A large yellow summary metric showing "212,310,000". Below it is a link to "View Report [Opp Overview]".
- Average Amount:** A large red summary metric showing "113,172". Below it is a link to "View Report [Opp Overview]".
- Opps by Owner:** A table with 10 columns showing data for Opportunity Owner, Industry, Stage, Type, Probability (%), and Amount. The table includes rows for Hank Chen, Nadia Smith, Brian Alison, and Sarah Vasquez across various industries and stages.

Now that Lightning dashboard tables are generally available, we've removed the org preference for turning them on and off from Setup.

Lightning dashboard tables aren't available in Salesforce Classic. You can't add them from the Classic dashboard builder, nor can you see them when you view a dashboard in Salesforce Classic.

Lightning dashboard tables now support these features, which were unavailable in the beta version:

- Chatter photos
- Conditional highlighting
- Dashboard filter compatibility
- Show total
- Reorder table columns: drag and drop columns in the column list (but not the preview) to change their order

Subscribe to Dashboards to Schedule Refreshes and Get Email Updates

It's Monday morning, and you're racing to the office. You have a meeting at 8:00 AM and must refresh the Sales Pipeline dashboard so you can present about quarterly goals. It's a good thing you subscribed to the Sales Pipeline dashboard and scheduled automatic dashboard refreshes each Monday at 8:00 AM. Your phone buzzes. Looks like you just received an up-to-date version of Sales Pipeline dashboard by email. Open it up and give it a quick review. You're ready to present! This feature is new in Lightning Experience.

USER PERMISSIONS

To subscribe to dashboards:

- Subscribe to Dashboards

DASHBOARDS	DASHBOARD NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Sales Overview		Company Dashboards	Fred Williamson	<input type="checkbox"/>
Created by Me	Company Performance Da...		Company Dashboards	Fred Williamson	<input checked="" type="checkbox"/>
Private Dashboards	Sales Pipeline		Company Dashboards	Fred Williamson	<input type="checkbox"/>
All Dashboards	Adoption Dashboard		Company Dashboards	Fred Williamson	<input type="checkbox"/>
FOLDERS					
Created by Me					
Shared with Me					
All Folders					
FAVORITES					
All Favorites					

Start or edit a dashboard subscription from the Dashboards tab. Find the dashboard you want to subscribe to, and click > **Subscribe**. Alternatively, view the dashboard and then click **Subscribe**. Then, set the subscription schedule. For example, to review your Sales Pipeline dashboard at the start of each week, set **Frequency** to **Weekly**, **Days** to **MON** (for Monday), and **Time** to **8:00 AM**.

As you prepare to subscribe to dashboards, take note of these considerations and allocations.

- Each person in your org can subscribe to up to five dashboards.

- You can subscribe to filtered dashboards, but dashboard filters are never applied to emailed dashboards.
- Emailed dashboards are always displayed with a one-column layout. Each row displays one dashboard component.
- Dashboards configured to display data as **The dashboard viewer** under the View Dashboard As settings in Dashboard Properties (often called *dynamic dashboards*), don't support subscriptions. You can't subscribe to them.

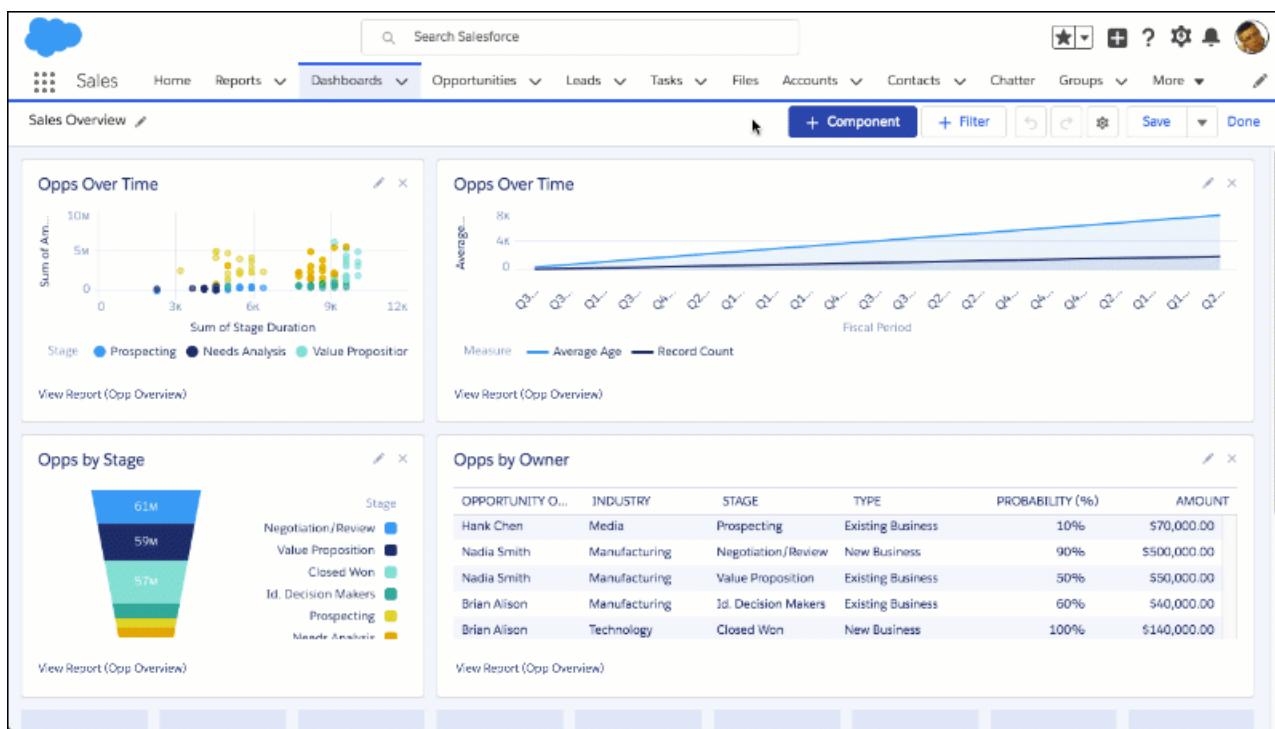
Color Your Dashboard Data with Themes and Palettes

Customize colors in your dashboard by choosing a light or dark theme and one of 14 color palettes. Themes and color palettes help you organize and curate data in your dashboard. For example, call attention to a set of summary metrics by giving them a dark theme and setting them against a light-themed dashboard. This feature is new in Lightning Experience.

USER PERMISSIONS

To set dashboard color themes and palettes:

- Change Dashboard Colors

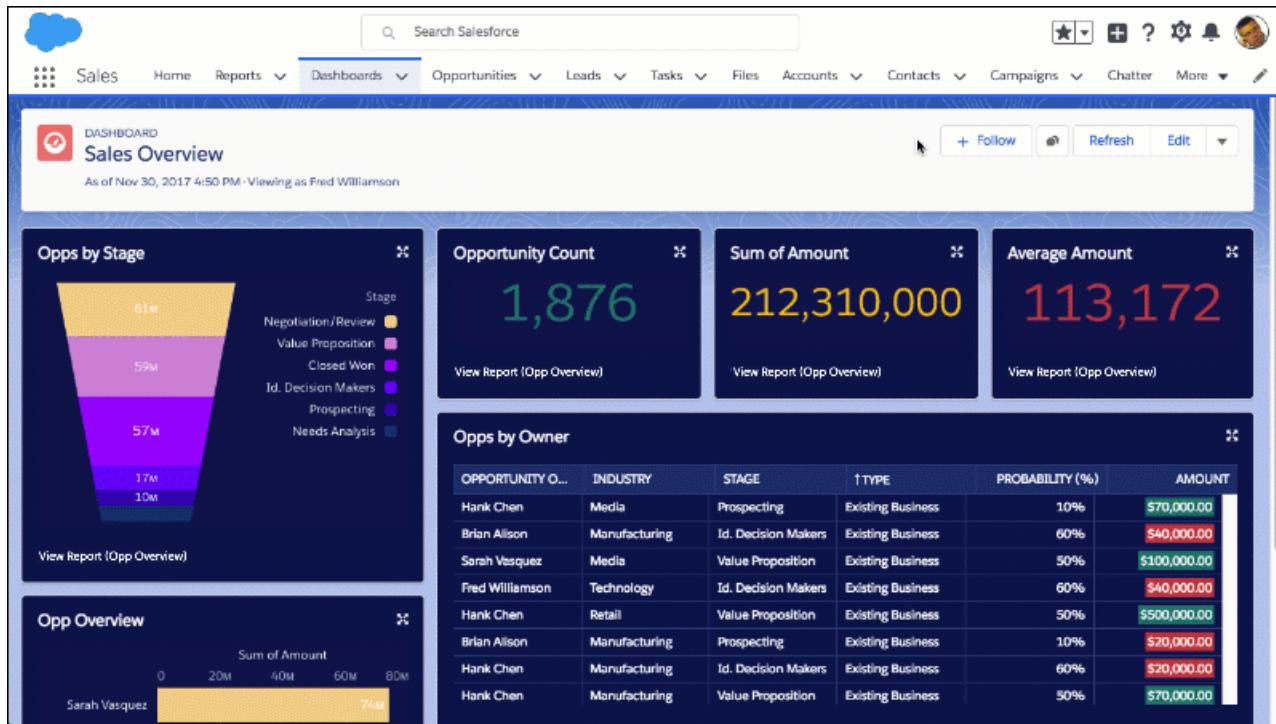


To choose a dashboard theme and color palette, edit the dashboard and then open Dashboard Properties by clicking .

To choose a component theme, edit the dashboard and then edit the component by clicking . You can set component-specific themes, but not component-specific color palettes.

Improved Experience for Sharing Dashboard Components on Chatter

Sharing a dashboard component on Chatter now matches the share-on-Chatter experience across Salesforce. Previously, you chose to post an image of a dashboard component to either the dashboard feed, your feed, or a group feed. You couldn't @mention anyone and you couldn't format your post with rich text features like **bold** and *italics*. Now, you always post to the dashboard feed, @mention people and groups, and format with rich text like you can on other feeds. (So, go ahead and make your post as **bold** as you like!) Plus, you can review the dashboard feed while you're sharing a component! This feature is new in Lightning Experience.



We've also changed the way share a component. To share a dashboard component, first expand it by clicking . Then, click , compose a post, and click **Share**.

Other Enhancements to Dashboards in Lightning Experience

In addition to this release's major features, we've made some small-but-notable improvements to dashboards. These changes apply to Lightning Experience only.

View Report Button on Dashboard Components Includes the Source Report Name

Previously, the button read **View Report**. Now, the button includes the source report name in parentheses. If the source report is named Opportunity Overview, the button reads **View Report (Opportunity Overview)**.

Folders: Find and Favorite

Folders are key to organizing and sharing reports and dashboards. Now, you can find report and dashboard folders using Salesforce search. And once you find the folder you're looking for, favorite it for easy access later. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Search for Folders with Salesforce Search](#)

It's gotten much easier to find the report and dashboard folders you're looking for, now that folders are supported in global search. This feature is new in Lightning Experience.

[Favorite a Folder to Find it Fast](#)

Got some report and dashboard folders you want to remember and return to later? You can now mark them as favorites in the same way you would for other Salesforce objects. This feature is new in Lightning Experience.

Search for Folders with Salesforce Search

It's gotten much easier to find the report and dashboard folders you're looking for, now that folders are supported in global search. This feature is new in Lightning Experience.

Searching for folders in global search works just like you'd expect for other Salesforce objects. Only one extra step to remember: If the folder you're looking for doesn't appear in the search results, click **Show More** on the left side of the page, and select **Folders** to display the matching folders.

Favorite a Folder to Find it Fast

Got some report and dashboard folders you want to remember and return to later? You can now mark them as favorites in the same way you would for other Salesforce objects. This feature is new in Lightning Experience.

When you favorite a folder, it's added as a global favorite, and also added to the All Favorites list in the Reports or Dashboards menu.

Chart Enhancements for Reports and Dashboards in Lightning Experience

Visualizing business data is understanding business data, so we've improved charts to help you see it better. These changes apply to Lightning Experience only.

Display Up to 1,000 Groups in Line and Bar Charts in Dashboards

For line and bar charts, including cumulative line charts and stacked bar charts, we've upped the number of displayed groups from 500 to 1,000! All other chart types still show up to 200 groups. In Reports, charts continue to show up to 2,000 groups.

Set Chart Legend Position

Choose whether to set the once-fixed legend to appear on either the right-hand side of a chart, or the bottom.

Download Chart Images from Dashboard Components

Expand a dashboard component, then click  to download the chart as a .png image file.

Combine Small Groups into "Others" on Donut and Funnel Charts

Keep donut and funnel charts easy to read by grouping segments that comprise 3% or less of total data into a group called "Others".

Edit Segment Ranges on Gauge and Metric Charts Regardless of Whether or Not You Show the Range

Previously, to edit segment ranges on gauge and metric charts you had to select **Show Range**. Now, you can customize segment ranges regardless of whether you select **Show Range** or not.

Show Total on Donut Charts

Choose to show or hide the total in the center of donut charts.

Show both Totals and Percentages on Donut Charts

Previously, you could show either numerical values or percentages on donut charts. Now, you can show both at the same time. To help you show both values and percentages at once, we replaced the Label Groups dropdown with checkboxes: **Show Values** and **Show Percentages**.

Einstein Analytics: Learning Adventures, Conversational Exploration, Einstein Data Insights

Help users get started in Einstein Analytics with integrated and fun learning features. Quickly query and visualize data in a guided, natural language conversation (beta). Build charts more easily with the power to specify which field to use for each chart feature. Save views of dashboards that you've set up with your preferred selections and filters. Have Einstein analyze your report data with the pilot launch of Einstein Insights.



Note: The supported browsers for Einstein Analytics are Microsoft® Edge, Microsoft Internet Explorer® version 11, and the most recent stable versions of Mozilla® Firefox® and Google Chrome™. Analytics isn't supported on Apple® Safari®.

EDITIONS

Available for an extra cost in **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in **Developer** Edition.

IN THIS SECTION:

[Analytics Onboarding: Expanded Help Menus, Learning Map, Adventure App](#)

Here comes a wealth of resources to help you and your users get on board fast. With pinnable in-app Help, walkthroughs, resource maps, and samples of chart and app building, everyone can find an approach that works for them.

[Analytics App Building: Conversational Exploration, Context-Sensitive Chart Builder, Personal Dashboard Views](#)

Quickly query and visualize data in guided, natural language conversations. Build charts more easily by specifying which fields to use for chart features, like axes, bubble size, and bubble color. Create your own view of a dashboard by applying and saving your preferred selections and filters.

[Analytics Data Integration: New Connectors and Enhancements to the Dataflow Editor and Dataset Recipes](#)

Connect to even more data with a host of new connectors. Spend less time in the dataflow editor thanks to productivity tweaks. Open up recipes to more people, and take advantage of enhancements to help you manage your recipes.

[Analytics Prebuilt Apps: New Dashboards, Deeper Data Analysis, Easier Setup and Customization](#)

The latest enhancements to our prebuilt Analytics apps make it easier to get valuable insights from Salesforce data. Use the new dashboards and enhanced customization features to drill deep into your data, whether you're analyzing your field service, sales, or service businesses.

[Einstein Discovery: Einstein Data Insights \(Pilot\), Analytics Data Access](#)

Introducing Einstein data insights (pilot): a smarter report. Einstein analyzes your report data to help you better understand it, revealing the insightful tidbits that you can act on! Plus, access more data more easily. Seamlessly use your Analytics data with Einstein Discovery. Upload and analyze data in languages that use UTF-8 encoding.

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IN THIS SECTION:

[Access Help Resources When and Where You Need Them](#)

The Einstein Analytics Help menu has a makeover. Now you can access relevant resources, from documentation to videos to Trailhead, wherever you are in Einstein Analytics. And you can preview Help articles in the menu without leaving the app.

[Take a Tour Before You Explore](#)

Walkthroughs come to Einstein Analytics. Our first walkthrough orients users in the explorer by pointing out its important features. Access the walkthrough in the new Help menu.

Find the Right Learning Resource for Each Step of the Einstein Analytics Journey

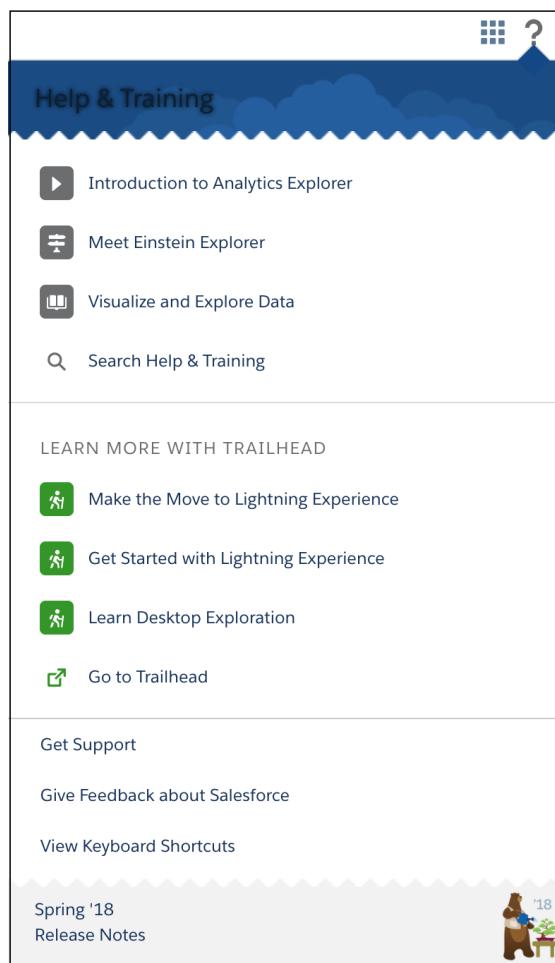
The Einstein Analytics Learning Map gives you a list of key resources for each action in every stage of your Analytics journey. The map is a fun, one-stop shop that helps users get up and running more quickly with Einstein Analytics. Look for it in the Help menu or directly at <http://www.einsteinanalyticslearningmap.com>.

Increase Your Skills with Analytics Learning Adventures

Ready, set, learn! The Einstein Analytics Learning Adventure app walks you through best practice examples for designing just the right visualizations and for building powerful, dynamic apps. Install the app in your org, and enable it for users. Most importantly, the Learning Adventure App was built on and runs in Einstein Analytics. It's free on AppExchange here: <https://sfdc.co/zOqdS>.

Access Help Resources When and Where You Need Them

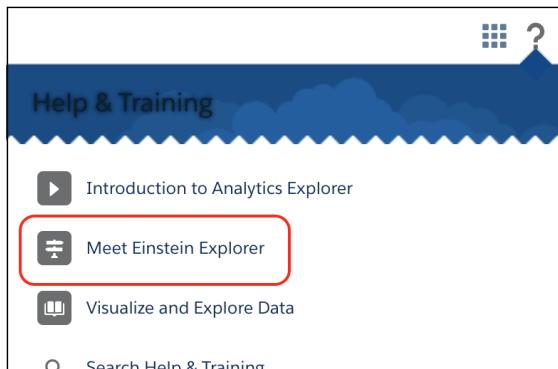
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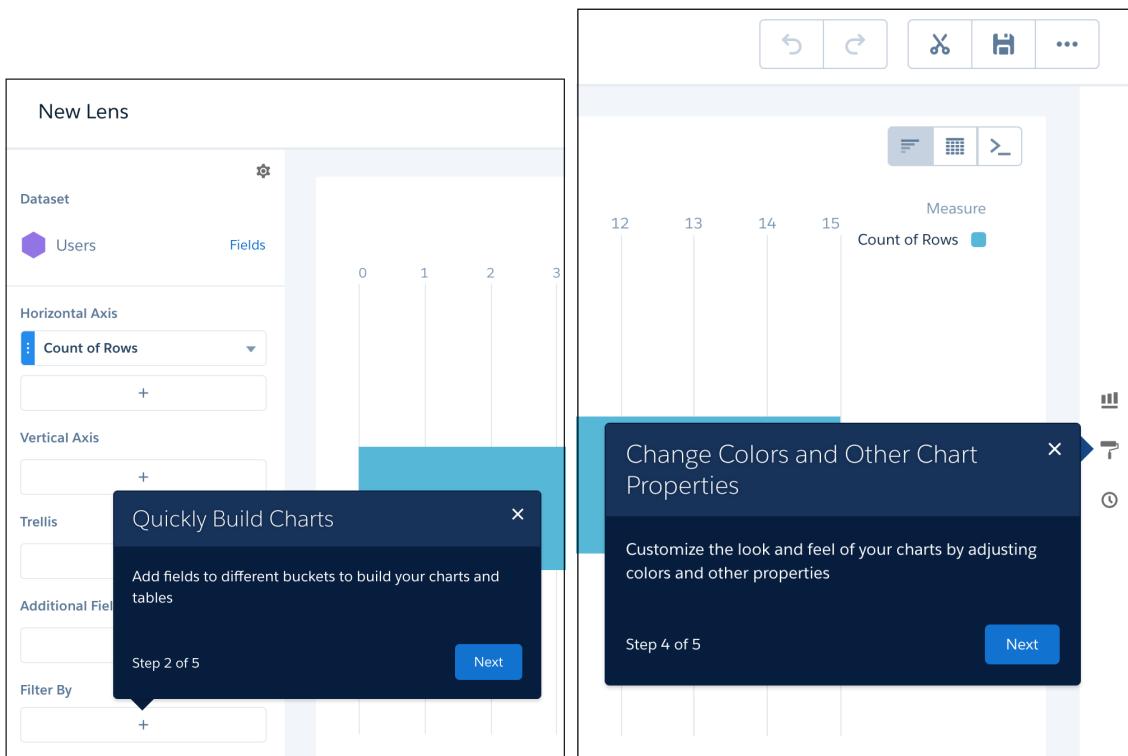
Click an entry with a book icon to see a preview within the menu. Other icons open learning resources in new tabs.

Take a Tour Before You Explore

Walkthroughs come to Einstein Analytics. Our first walkthrough orients users in the explorer by pointing out its important features. Access the walkthrough in the new Help menu.



The walkthrough provides a quick, high-level tour around the explorer.



Find the Right Learning Resource for Each Step of the Einstein Analytics Journey

The Einstein Analytics Learning Map gives you a list of key resources for each action in every stage of your Analytics journey. The map is a fun, one-stop shop that helps users get up and running more quickly with Einstein Analytics. Look for it in the Help menu or directly at <http://www.einsteinanalyticslearningmap.com>.



Click each point on the trail to see resources for:

- Enabling Analytics and integrating data
- Building and producing Analytics apps, dashboards, and lenses
- Using Analytics to gain insights and collaborating with others over Analytics assets
- Getting to insights even faster with prebuilt Analytics apps
- Learning what's new in Einstein Analytics

Increase Your Skills with Analytics Learning Adventures

Ready, set, learn! The Einstein Analytics Learning Adventure app walks you through best practice examples for designing just the right visualizations and for building powerful, dynamic apps. Install the app in your org, and enable it for users. Most importantly, the Learning Adventure App was built on and runs in Einstein Analytics. It's free on AppExchange here: <https://sfdc.co/zOqdS>.



Here are a couple of example pages.

Choosing the Right Chart

Learn which chart types are best for visualizing your data.

PLAY!

Click the toggle below the chart to see different chart types. Which one looks best to you?

See What You're Made Of

See the relative makeup of a measure, like revenue, by product family.

Why Composition Charts?

There's a time and place for donuts. And pie, and sunburst, and treemaps. Composition charts are for the relative makeup of a single measure across a single group.

With composition charts, you may be more interested in percentage than individual values.

Be reasonable about the number of wedges. More than 20? Use a pie chart. Our eyes can detect area differences as well as height or length.

This example shows revenue by product family. You quickly see Accessories and Laptops are taking it in. Nice!

Did You Know?

A pie is a donut with no hole. Set Center Size to 0% in Donut Chart properties.

How two groupings? Set `GroupBy` in Treemap properties to make more donuts. For example, if your first grouping is Product Family and your second is Model, you can have a donut for each family, with products as wedges. You can have three groupings using trellis, but that's a lot of wedges...

Treemaps are great for showing actual spatial composition (like square footages), as well as relative makeup.

DEV DEEPER

Make It Dynamic!

The chart type depends on the context of the viewer.

INTRODUCTION

CATEGORY

- COMPARISON
- TRENDS
- RELATIONSHIP
- COMPOSITION
- DISTRIBUTION
- METRICS
- LOCATION

HOME

GOAL

Build bindings that conditionally highlight results based on their values. Color coding better shows how you're doing in each industry.

Build It Yourself!

Complete the following steps for each industry's dashboard. Let's see how to do this for the banking industry.

- Create a number widget ('Amount'). It needs a step ('Amount', 'Banking'), add a 'Value' dimension in the formula statement.
- In the SQL query for the step ('Amount', 'Banking'), add a 'Value' dimension in the formula statement.
- To dynamically change the number's color based on the value determined by the 'Amount' dimension, we need to use the 'highlight' property in the number widget ('Amount', '1').
- 'NumberColor': '\$AmountAmount_Banking.result', 'Value': 'Amount'}
- Click Done and you're ready to go.

To see how we created the widgets, steps, and bindings in this dashboard, press Ctrl+F for Mac or Shift+F for Windows, and search for them in the file `Amount.js`.

Analytics App Building: Conversational Exploration, Context-Sensitive Chart Builder, Personal Dashboard Views

Quickly query and visualize data in guided, natural language conversations. Build charts more easily by specifying which fields to use for chart features, like axes, bubble size, and bubble color. Create your own view of a dashboard by applying and saving your preferred selections and filters.

IN THIS SECTION:

[Analytics Exploration: Conversational Exploration, Context-Sensitive Chart Builder, Images in Tables](#)

Quickly query and visualize data in guided, natural language conversations. Build charts more easily by specifying which fields to use for chart features, like axes, bubble size, and bubble color. Make tables visually appealing by displaying photos, icons, and other images. Configure lens-specific filters, and set query limits directly in the explorer.

[Analytics Visualization and Dashboard Design: Saved Views, More Charts, and Customized Tooltips](#)

Create your own view of a dashboard by applying and saving your preferred selections and filters. Visualize results over time with the new time bar and time combo charts. Share key information about each data point in a chart with customizable tooltips and markers.

[Analytics Development and Customization: New APIs and Saved Views in Embedded Dashboards](#)

The Analytics platform continues to grow with more REST APIs and support for personal views in embedded dashboards. In addition, new SAQL documentation can help you write your own queries.

Analytics Exploration: Conversational Exploration, Context-Sensitive Chart Builder, Images in Tables

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IN THIS SECTION:

[Converse with Your Data \(Beta\)](#)

Ask data questions using non-technical language, and view answers in automatically configured charts. Start with a common word or two, and Analytics provides relevant suggestions that you can accept or edit. Guided conversations reduce the number of clicks needed to explore data, and setting up queries is easier.

[Take the Mystery out of Creating Charts with the New User Interface](#)

Our new, foolproof chart builder makes it easy to create charts the way you want to, without worrying about the query details behind each chart type. No more figuring out how the number and order of measures and groupings impact each chart type. Just tell the chart builder which field to use for each chart feature—like which field should appear on the horizontal axis.

[Quickly Hone In on Relevant Data with Lens Filters](#)

Tired of having to add the same filter to each column in a compare table? We introduce lens filters, which let you glean insights from your dataset a lot quicker.

[Do More with Compare-Table Formulas and Functions \(Generally Available\)](#)

You have access to raw column names—making it easier to write more intuitive compare-table formulas. Even better, the formula editor includes nifty function and formula pickers that save you time as you enter your SAQL formulas.

[Dress Up Tables with Images](#)

Make your compare tables and values tables more appealing by displaying images.

[Make Columns Stand Out with New Properties](#)

Some columns are more important than others. The new Column Properties panel lets you jazz up the columns you want in compare tables and values tables. In addition to displaying data in the default text format, you can set measure column's data type as bar as well. For columns with text, you can specify text alignment and style.

[Limit Query Results for Efficiency](#)

Is the size of your dataset slowing you down? Interested in reviewing just the top 10 accounts in your product pipeline—without excessive scrolling? To fast-track to meaningful insights and for improved performance on your dashboards, you can limit the size of query results in a lens.

[Enjoy Exploring in an Improved Interface](#)

Explore your data more quickly with the latest updates to the interface.

[Other Enhancements to Explorer](#)

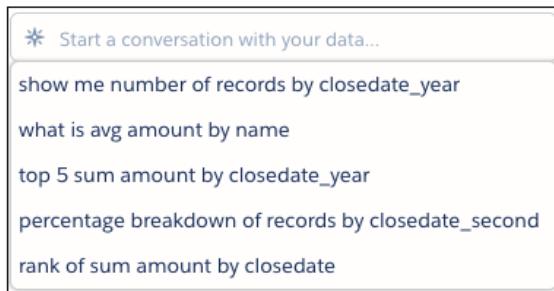
In compare tables, when you apply the **Currency with cents** format, formula columns display two decimal places for all values by default.

Converse with Your Data (Beta)

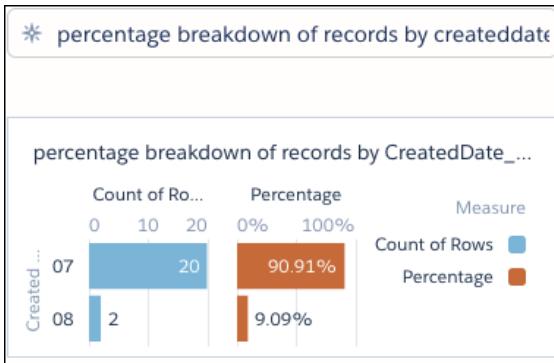
Ask data questions using non-technical language, and view answers in automatically configured charts. Start with a common word or two, and Analytics provides relevant suggestions that you can accept or edit. Guided conversations reduce the number of clicks needed to explore data, and setting up queries is easier.

To enable the feature, go to the Analytics Settings page in Setup, and select **Enable Conversational Exploration (Beta)**. Conversations are then available in dashboards running in apps, explorer, and dashboard designer.

Start a conversation by clicking . When you click the text box, you're prompted with suggestions based on the fields in your dataset(s). To see which datasets are open for conversational exploration, look for the purple hexagons.

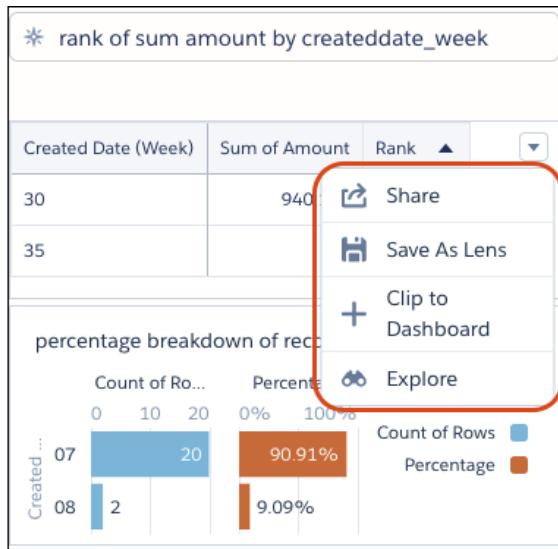


Narrow in on your question by typing the name of a measure field in your dataset. As you type, Analytics provides guidance relevant to your data. Click a suggestion to see a table or chart.



 **Tip:** When you're using conversational exploration in the explorer, click **Fields** to view the available fields to ask about. If you're in the dashboard designer or a running app, and the suggestions don't include the words you expect, click **Add Dataset** to expand your exploration.

When you have the chart that answers your question, open the dropdown menu. Depending on the context, you can save the visualization as a lens, share it, clip it to the designer, or continue your data exploration.



Take the following into consideration.

- Conversational exploration requires the Analytics Platform permission set license. It's not available in embedded dashboards, mobile apps, Analytics for Communities, or standalone Analytics apps, such as the Sales Analytics app.
- Conversational exploration is available only in the dashboard designer, explorer, and dashboards running in an app.
- Advanced functions aren't supported in conversational exploration.

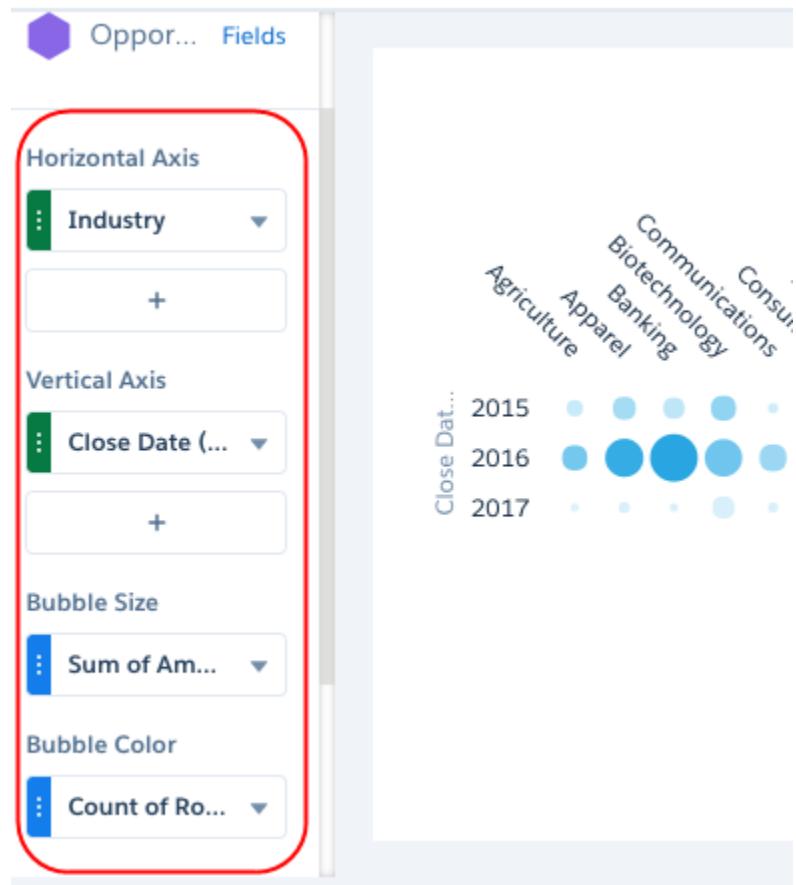


Note: The Spring '18 release contains a beta version of the conversational exploration feature, which means it's a high-quality feature with known limitations. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for this feature in the [IdeaExchange](#).

Take the Mystery out of Creating Charts with the New User Interface

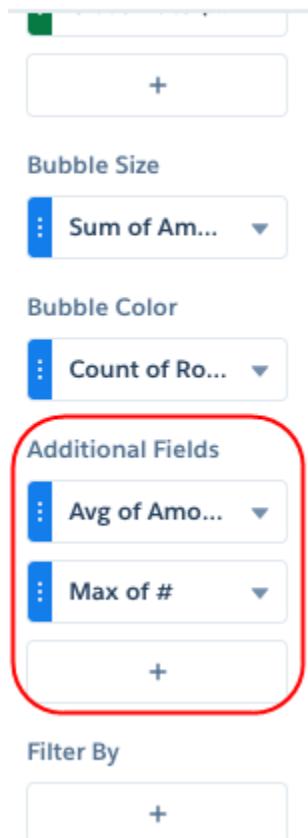
Our new, foolproof chart builder makes it easy to create charts the way you want to, without worrying about the query details behind each chart type. No more figuring out how the number and order of measures and groupings impact each chart type. Just tell the chart builder which field to use for each chart feature—like which field should appear on the horizontal axis.

For example, when you create a matrix chart, pick a dimension for each axis and the measures that determine the bubble size and color. To save a little time, drag and drop fields within the panel to move them from one section to another or change their order within a section.



In explorer, you can change a chart to any chart type—no more chart types grayed out because they require a different number of measures and groupings. If the new chart type requires more fields, the interface lets you know. If the new chart doesn't require some of the currently selected fields, the chart builder moves them to the Additional Fields section. Although additional fields don't affect the chart, the query still returns their values in case you want to later use them.

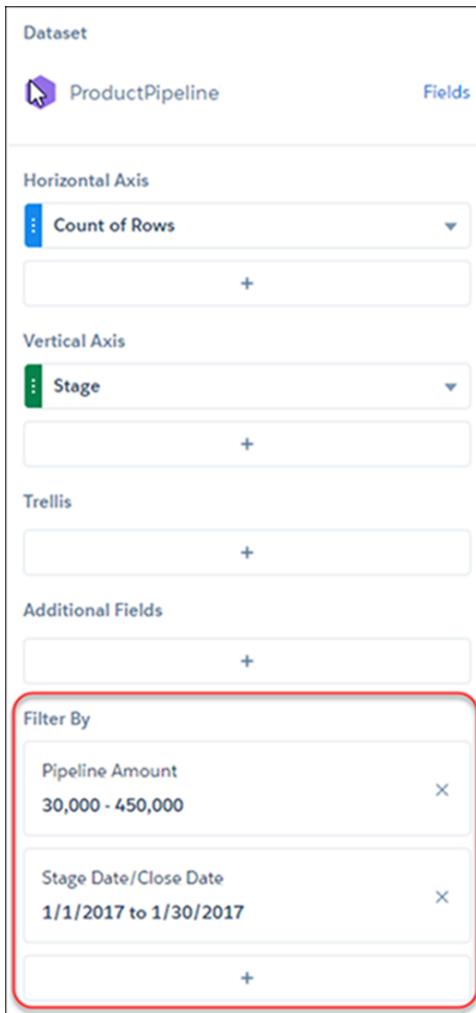
Billing_Country_1



Quickly Hone In on Relevant Data with Lens Filters

Tired of having to add the same filter to each column in a compare table? We introduce lens filters, which let you glean insights from your dataset a lot quicker.

You can create lens filters on measures, dimensions, or dates and apply them to the compare table in a single step. Applying lens filters to the data also makes it easier for you to drill down or focus on specific datapoints. Plus, you can configure filter attributes directly in the explorer.



Don't want filters to be applied to the dataset as you drill down? Then, define filters on individual measures, which don't persist. On the other hand, global lens filters are preserved when you switch to **View Details** or the values table.

Tip: Now is a great time to review your compare-table filters. If you've applied the same filter to all columns in a compare table, replace them with a lens filter.

Do More with Compare-Table Formulas and Functions (Generally Available)

You have access to raw column names—making it easier to write more intuitive compare-table formulas. Even better, the formula editor includes nifty function and formula pickers that save you time as you enter your SAQL formulas.

You can reference measure and group columns by name instead of by reference letter. You can also use SAQL percentile functions in the formula editor. The SAQL functions percentile_disc() and percentile_cont() are available in the compare-table formula editor, as are SAQL date functions.

See the [Analytics SAQL Reference Guide](#) for more.

Dress Up Tables with Images

Make your compare tables and values tables more appealing by displaying images.

Include reps' Chatter profile pictures next to their KPIs in leaderboards. Or, add flags to your compare table showing worldwide sales data.

In the column you want to display images, include the Salesforce URLs that point to the images. In Column Properties, set the data type to **Image**. If you set the cell height or width for this column, we ensure that the images maintain their aspect ratio.

The screenshot shows the Einstein Analytics interface with a dataset titled "Worldwide Sales". On the left, there's a sidebar with "Dataset" and "Fields" sections, and a "Filter By" section with a "stage" dropdown set to "won". The main area displays a compare table with columns: #, Country, Region, Amount, and Profit. The "Region" column is highlighted with a red border and contains small flags corresponding to the countries listed: Asia Pacific, Australia, China, Japan, Korea, Russia, India, United States of America, and Europe. The table data is as follows:

#	Country	Region	Amount	Profit
1	Asia Pacific		33,593,967	8,787,687
2	Australia		14,829,767	98,798,789
3	China		56,593,967	909
4	Japan		39,829,767	288,775
5	Korea		44,829,767	897,876
6	Russia		24,829,767	9,875,756
7	India		30,829,222	32,456
8	United States of America		89,593,967	65,453
9	Europe		35,033,967	757,982

Make Columns Stand Out with New Properties

Some columns are more important than others. The new Column Properties panel lets you jazz up the columns you want in compare tables and values tables. In addition to displaying data in the default text format, you can set measure column's data type as bar as well. For columns with text, you can specify text alignment and style.

To set a column's properties, select the column in the table or from the **Choose Column** list in Column Properties.

The screenshot shows the Einstein Analytics interface with a table containing columns: #, Account, City, Source, Product Family, Pipeline Amount, and Stage. The "Pipeline Amount" column is selected and highlighted with a red border. A "COLUMN" tab is active in the top right. A "Choose Column" panel is open, showing the selected column "Pipeline Amount" and various properties: "Show Data As" set to "Text", "Text Alignment" set to "Right", and "Text Style" set to "Bold".

#	Account	City	Source	Product Family	Pipeline Amount	Stage
1	Dooley Group	Chicago	Web	Laptop	256,669	1-Prospect
2	Dooley Group	Chicago	Web	Laptop	185,108	2-Needs Analysis
3	Gleason LLC	Miami	Partner	Laptop	453,630	1-Prospect
4	Gleason LLC	Albuquerque	Trade Show	Laptop	311,416	1-Prospect
5	Gleason LLC	Boca Raton	Trade Show	Tablet	324,917	1-Prospect
6	Gleason LLC	Chattanooga	Referral	Laptop	42,067	2-Needs Analysis
7	Christiansen LLC	Dallas	Advertisement	Laptop	415,213	2-Needs Analysis
8	Gleason LLC	Salt Lake City	Advertisement	Laptop	262,604	4-Negotiation
9	Dooley Group	Chicago	Referral	Laptop	164,494	1-Prospect
10	Dooley Group	Chicago	Referral	Laptop	355,812	2-Needs Analysis

You can also get to the Column Properties panel from a column's context menu.

Limit Query Results for Efficiency

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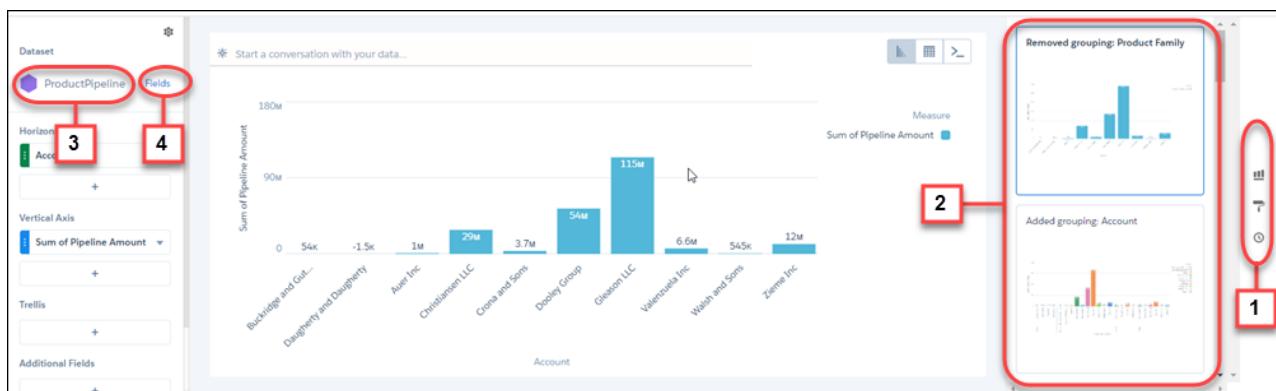
To set the limit for your query, click the gear icon, and then select **Set Limit**. Enter the size of the query result and click **Apply**.

If you edit your query in SAQL, you also need to set the query limit in SAQL.

 **Tip:** For a smoother scrolling experience, we recommend using the query result limit along with a chart's auto-fit feature.

Enjoy Exploring in an Improved Interface

Explore your data more quickly with the latest updates to the interface.



You can access suggested charts, formatting options, and exploration history more easily (1). The View History panel includes a thumbnail preview of the actions that you've taken in the lens—with the latest actions displayed on the top (2). The interface displays the name of the dataset you are currently exploring (3). And, you can access the dataset fields from right next to the dataset name (4).

Create and delete derived measures and derived dimensions directly from the dataset fields panel. You can also apply formats to the derived measures from here.

Other Enhancements to Explorer

In compare tables, when you apply the **Currency with cents** format, formula columns display two decimal places for all values by default.

Analytics Visualization and Dashboard Design: Saved Views, More Charts, and Customized Tooltips

Create your own view of a dashboard by applying and saving your preferred selections and filters. Visualize results over time with the new time bar and time combo charts. Share key information about each data point in a chart with customizable tooltips and markers.

IN THIS SECTION:

[Save Your View of a Dashboard](#)

No more reselecting the filters every time you open a dashboard because you don't have permission to save the selections permanently. Or because multiple users filter the dashboard differently. Now you can change the filters and save your own view. Only you can see your views.

[Visualize Data over Time with New Charts](#)

You can now visualize results with vertical bars, which are a great way to illustrate relative changes over time and highlight missing data. The new time bar chart works like the timeline, showing values of a single measure over time in vertical bars. The new time combo chart shows two measures over time—one on a timeline and the other on a time bar.

[Annotate Data Points with Tooltips and Markers](#)

Create your own tooltips and data-point markers in charts and add custom text. Create a tooltip to specify which details appear when you hover over any data point. To annotate a specific data point, add a marker and, if it needs more attention, make it blink.

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Improve your collaboration by showing colleagues the analytics you're seeing. When they click your dashboard link, they see the page that you want to show, with the filters and selections that you've so conscientiously set. Share a dashboard view via Post to Feed or Get URL in the Share dialog in Analytics Studio.

[Create PDF Files and Print Your Einstein Analytics Dashboards](#)

We heard that you love to share dashboards, and there's a new way to share. Einstein Analytics dashboards are now browser print-friendly. With the new Print action, you can print or save PDF files of dashboards.

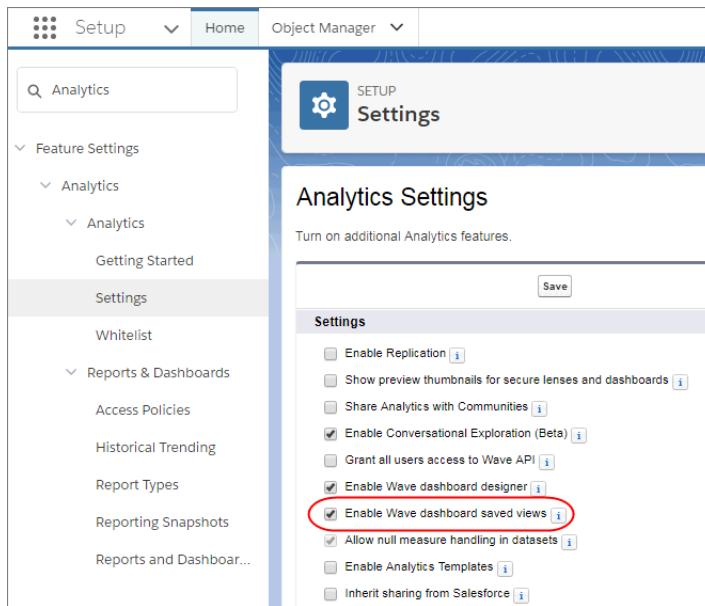
[Other Enhancements to Analytics Charts and Dashboards](#)

Our engineers keep working around the clock to keep Analytics fun and exciting. Now, charts morph, colors pop, axes sort, and the list of cool features goes on.

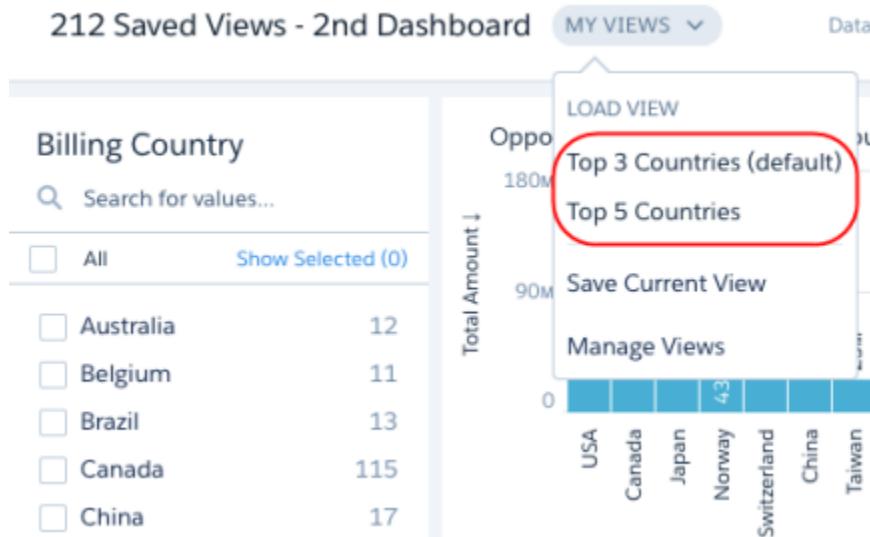
Save Your View of a Dashboard

No more reselecting the filters every time you open a dashboard because you don't have permission to save the selections permanently. Or because multiple users filter the dashboard differently. Now you can change the filters and save your own view. Only you can see your views.

 **Note:** By default, this feature is enabled for your org. To disable it, from Setup, enter *Analytics* in the Quick Find box, select **Settings** under Analytics, and then clear the **Enable Wave dashboard saved views** option. If you re-enable the feature, all previously created views are available.



You can create up to 10 views per dashboard and choose one as the default that shows when you open the dashboard. All your saved views are listed in the view menu.



To create a view, open the dashboard in view mode, make your selections, and click **Save View**. The view includes all selections that you made in list, toggle, range, date, chart, compare table, and global filter widgets.

When you change a selection in a view, an asterisk appears next to the view name to indicate that it's been modified. When you change a selection while viewing a dashboard without a view, Modified appears. In either case, you can save the current selections as a new view or overwrite an existing one. To remove your changes to a dashboard or view, click  . To remove the view applied to a dashboard

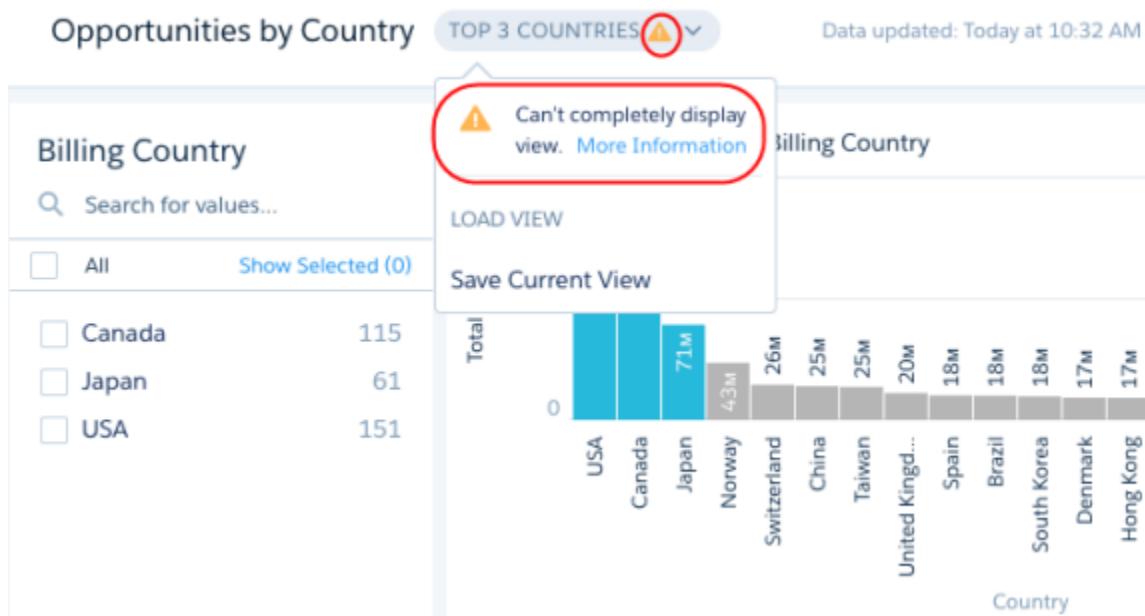
so you can view the original dashboard, click **Clear View** in the view menu. To set your default view or delete a view, click **Manage Views**.

 **Note:** In the Einstein Analytics mobile app, you can't manage or create new views, but otherwise, views are fully supported.

To share your view with others, open the view and select **Share > Get URL**. When users open the link, they see your view of the dashboard. If they want, they can save it as one of their own views.

If you open a dashboard that has external selections or filters, the default view isn't applied. If you open a view, the external selections and filters are removed.

If you open a view and Analytics can't display all the criteria defined in a view, it displays what it can and shows a warning next to the view name.



Analytics can't display all view criteria for the following cases.

- Analytics ignores selections and filters that no longer apply to the dashboard. For example, Analytics ignores references to datasets, fields, field values, and steps that no longer exist. These issues arise when the dashboard or data changes but the view isn't updated.
- A view applies to all layouts defined in the dashboard. If a view includes a selection on a widget that doesn't exist in a layout, Analytics ignores the selection.
- If a view is created based on a dashboard page that has since been deleted, Analytics shows the view based on the first page defined for the dashboard.

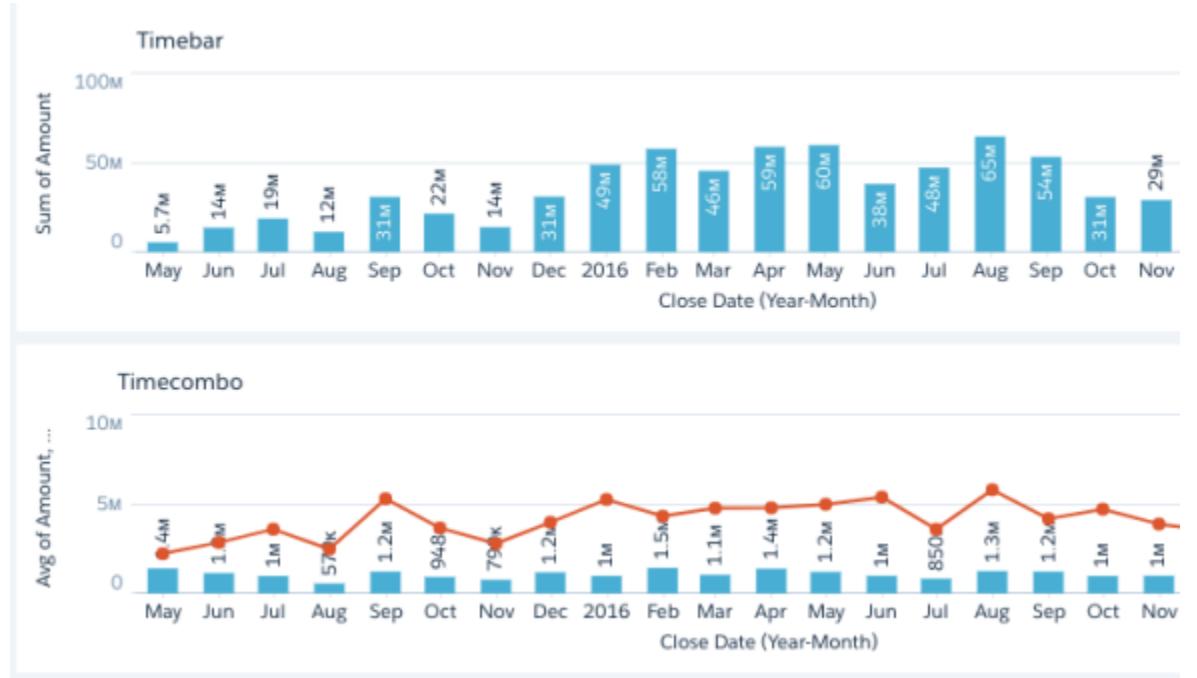
 **Note:** Because views are user specific, they aren't included when you package an app.

SEE ALSO:

[IdeaExchange: Save Filters in Wave/Einstein Dashboards](#)

Visualize Data over Time with New Charts

You can now visualize results with vertical bars, which are a great way to illustrate relative changes over time and highlight missing data. The new time bar chart works like the timeline, showing values of a single measure over time in vertical bars. The new time combo chart shows two measures over time—one on a timeline and the other on a time bar.



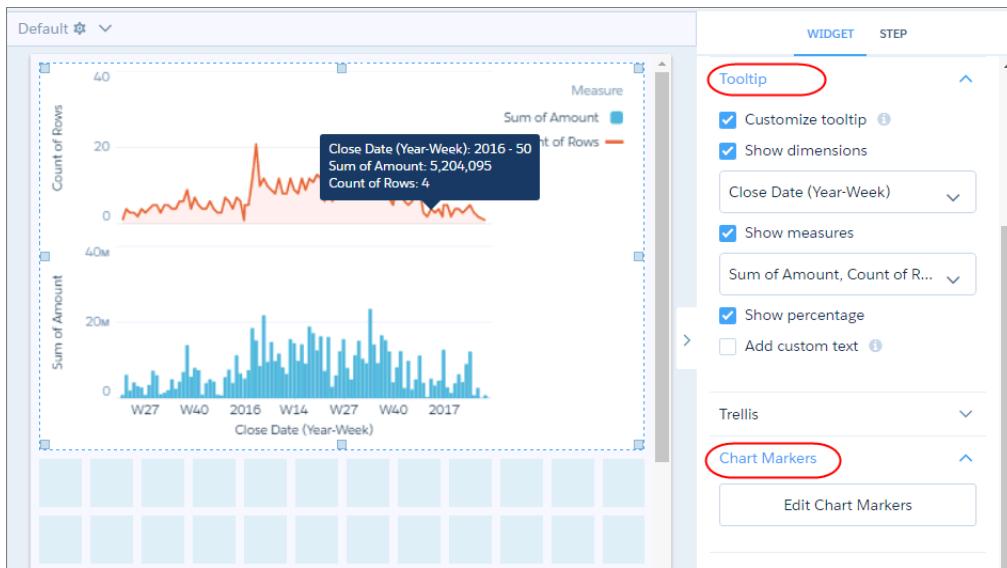
Annotate Data Points with Tooltips and Markers

Create your own tooltips and data-point markers in charts and add custom text. Create a tooltip to specify which details appear when you hover over any data point. To annotate a specific data point, add a marker and, if it needs more attention, make it blink.

The tooltips and markers appear when you hover over the data point. Check it out.



Add tooltips to any chart. You can add a marker to any chart, except sankey, origami, angular gauge, and rating. To add tooltips and markers, edit the dashboard, select the chart, and then set the widget properties under the Tooltip and Marker sections.

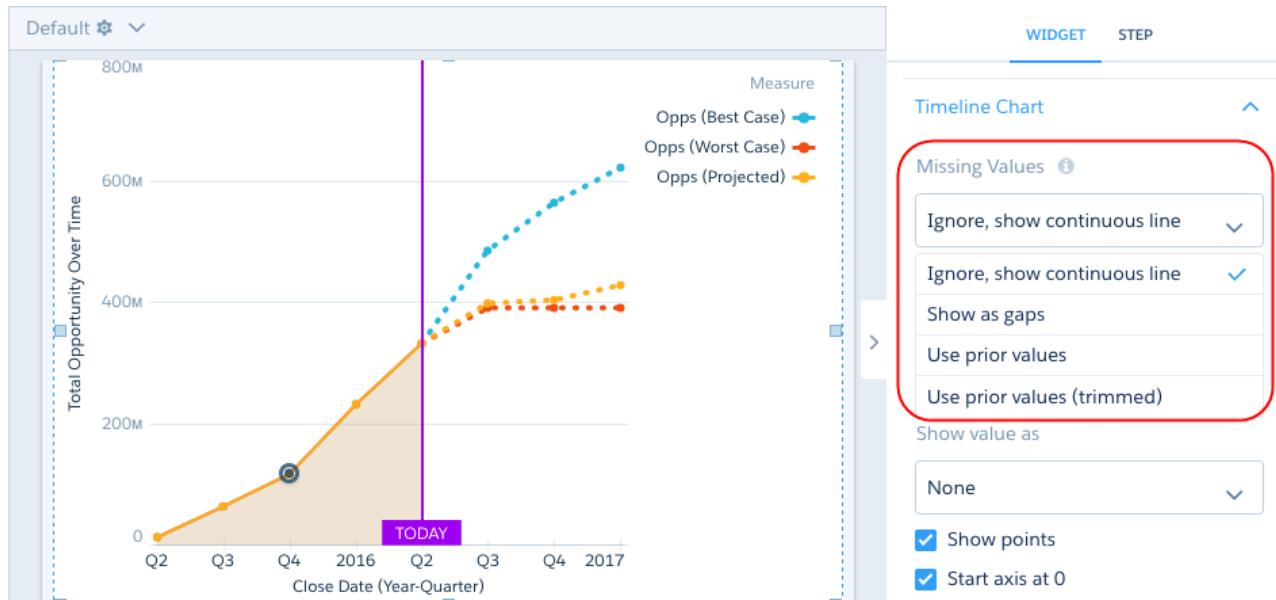


Show No Change in Cumulative Charts When Data Is Missing

Continuous lines in timeline and time combo charts can be misleading when data is missing at a point in time and the line continues through that point. For periods with missing data, you can now make cumulative lines horizontal to indicate that no change occurs.

Show each missing value as the prior value using one of the following options for the Missing Value chart property.

Value	Description
Use prior values	Uses the value prior to the missing data point to indicate no change. Use this option for charts that show cumulative values, such as timeline and time combo.
Use prior values (trimmed)	The line ends at the last data point.



Let's look at a cumulative graph using each option.

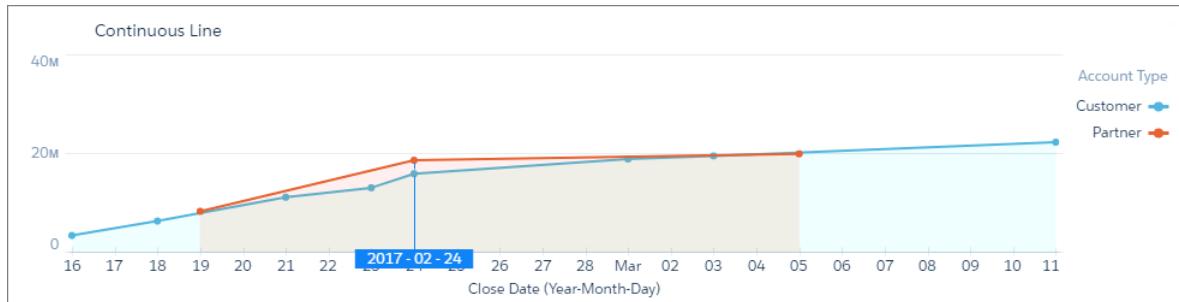
Show as gaps

The graph connects contiguous points and shows gaps whenever data is missing.



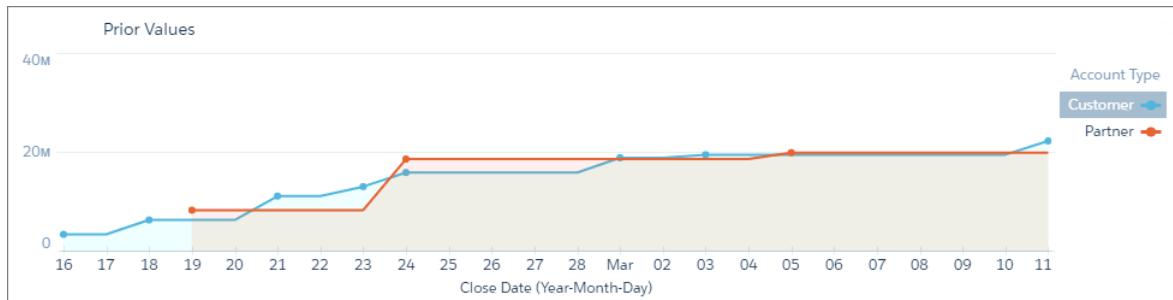
Ignore, show continuous line

The graph connects all data points, glossing over missing data. The graph starts at the first data point and ends at the last for each measure.



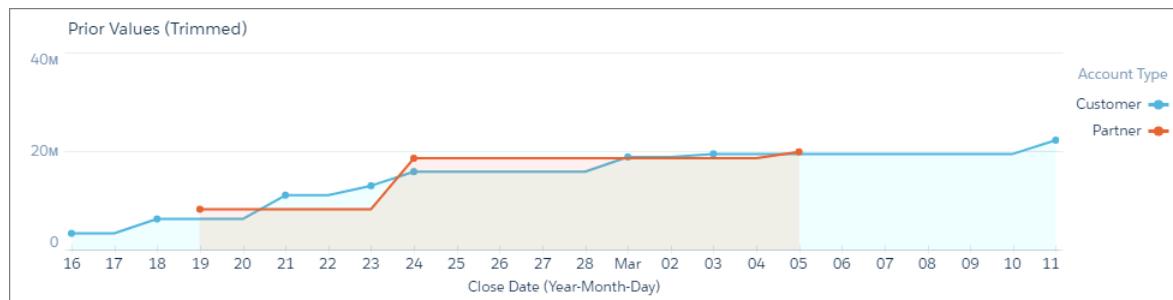
Use prior values

Because no deals closed between February 20 and 23, the cumulative value doesn't change for the partner line. To show no change, the chart uses the same value from the previous data point on February 19. This chart is more accurate than the previous graph, which is misleading because it shows an upward trend during this same time period.



Use prior values (trimmed)

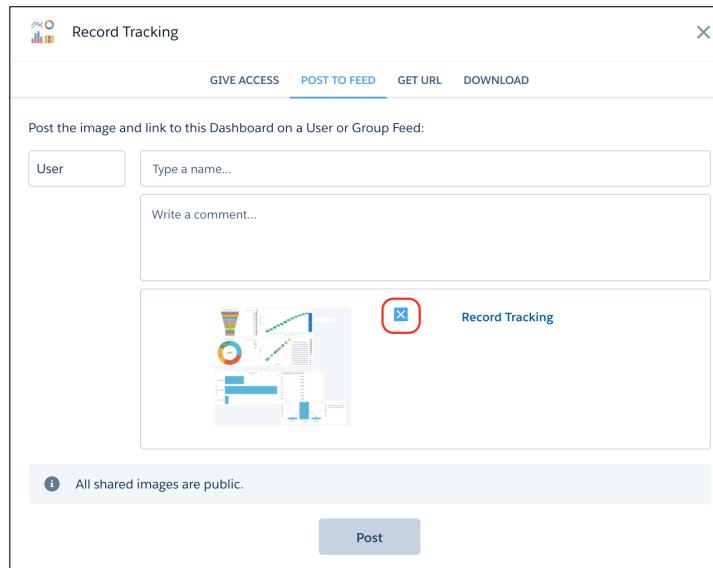
This graph is the same as the Use Prior Values graph, except that it's truncated on the right because there's no data after March 5.



Share Dashboards Filtered Your Way

Improve your collaboration by showing colleagues the analytics you're seeing. When they click your dashboard link, they see the page that you want to show, with the filters and selections that you've so conscientiously set. Share a dashboard view via Post to Feed or Get URL in the Share dialog in Analytics Studio.

The URL with page and view specifications opens in Analytics Studio. If sharing via Post to Feed, hover on the image and click the **X** so that only the URL is shared.



Links that open to a specified dashboard page and view are supported in embedded dashboards, Analytics for Communities, and in the mobile app.

Take the following into consideration.

- Sharing filtered dashboards is available in Analytics Studio but not under the Analytics tab.
- To generate a URL with page and view specifications, posts to Chatter can't include an image of the dashboard.
- If colleagues want their own version of your view, they must save it using the Views menu on the dashboard in their app.

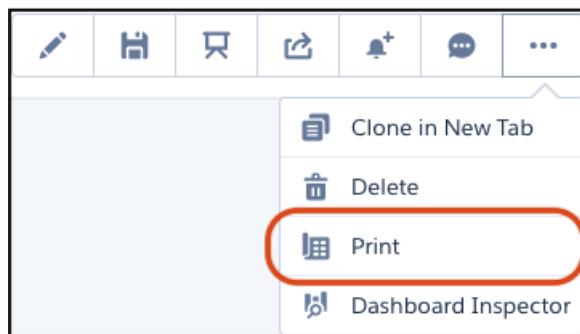
For more information about saving dashboard views, see [Save Your View of a Dashboard](#).

Create PDF Files and Print Your Einstein Analytics Dashboards

We heard that you love to share dashboards, and there's a new way to share. Einstein Analytics dashboards are now browser print-friendly. With the new Print action, you can print or save PDF files of dashboards.

Printing is available in the dashboard preview mode in Analytics Studio.

1. Click to open the menu, and select **Print**.



A snapshot of your dashboard opens.

2. In your browser's File menu, select Print and set the destination to your printer or Save as PDF.

3. (Optional) To include background color or images, click **More settings** and select **Background graphics**.

4. When you're finished printing, click **Done**.

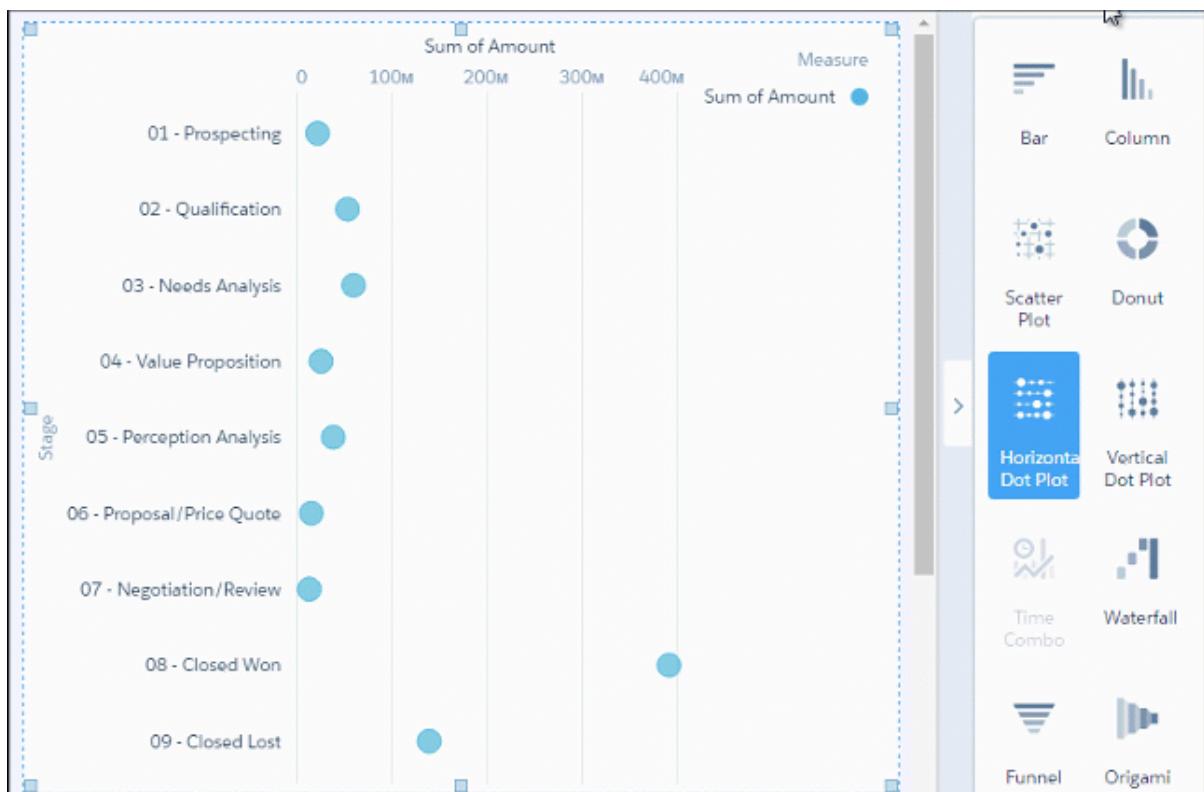
When printing a dashboard, consider the following.

- Print is supported in Chrome browsers only.
- The Print action is not included with embedded dashboards.
- The print is a snapshot of the dashboard with your current filters and selections. If a widget is scrollable, only the current view of the widget prints. If the dashboard has multiple pages, only the currently open page prints.
- Colors and page orientation are based on your print settings.

Other Enhancements to Analytics Charts and Dashboards

Our engineers keep working around the clock to keep Analytics fun and exciting. Now, charts morph, colors pop, axes sort, and the list of cool features goes on.

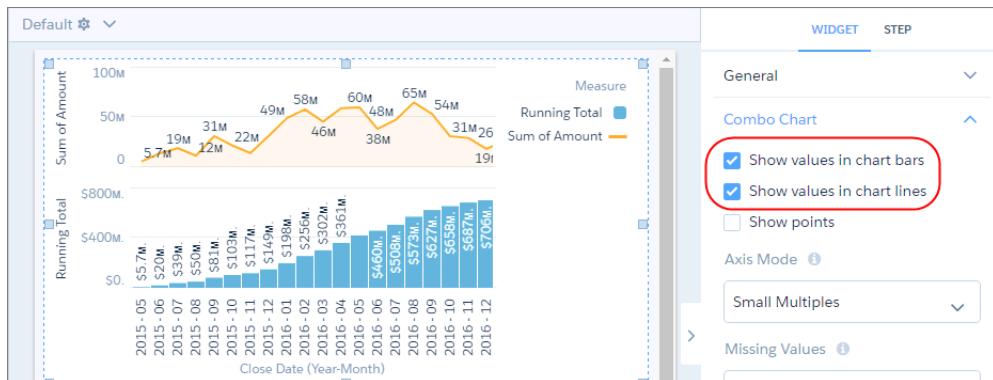
- When you change a chart type, watch the chart morph. (+10 points for coolness, right?)



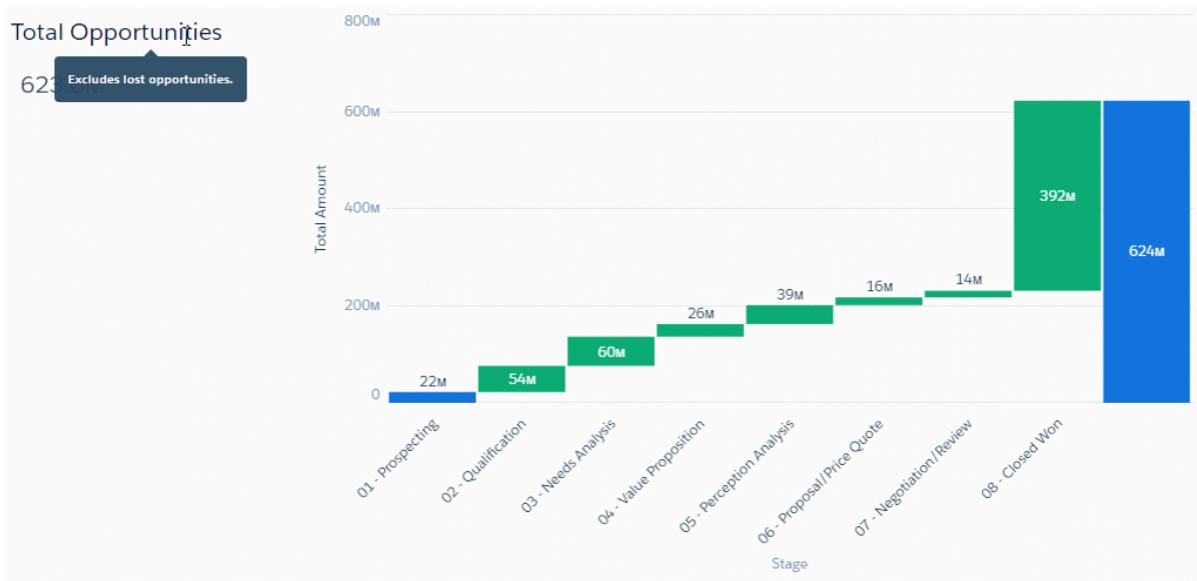
- To sort measures differently, click a measure axis title in a chart. This feature applies to all charts with measure axes, except scatterplot or charts that also have a time axis.



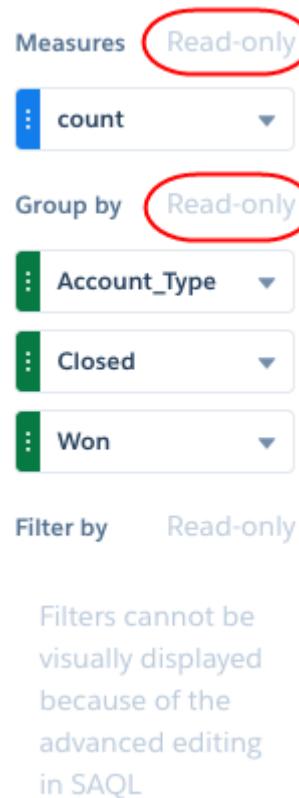
- Show data values on lines and bars in combo, line, and time combo charts.



- Add context to image and text widgets by adding tooltips.



- Previously, if you ran a query in the SAQL editor and switched back to chart mode, the measures and groupings became read-only.



This behavior no longer occurs. You can now edit the measures or groupings. Filters remain read-only.

- Wave dashboard designer is now called "dashboard designer." The old designer is still called "classic designer."

Analytics Development and Customization: New APIs and Saved Views in Embedded Dashboards

The Analytics platform continues to grow with more REST APIs and support for personal views in embedded dashboards. In addition, new SAQL documentation can help you write your own queries.

IN THIS SECTION:

[Include the Views Menu with Embedded Analytics Dashboards](#)

Gone are the days of creating multiple versions of one dashboard. With the Views menu, embedded dashboards give users the chance to set up dashboard filters and selections and save the views they want. The Views menu is now part of the dashboard header, whether embedded through Visualforce, Page Layouts, Lightning App Builder, or Communities Builder.

[Bind Measures and Groupings in Spring '18 Charts](#)

To bind measures and groupings for charts created in Spring '18, replace the `columnMap` section in the chart JSON with an empty `columns` property. The `columnMap` section supports the new chart builder by tracking the step's measure or grouping that maps to each chart widget-level property.

[Get Familiar with JSON Changes for Dashboard Designer](#)

The dashboard JSON contains new and changed parameters that impact users who create the JSON from scratch.

[Updates to the REST API](#)

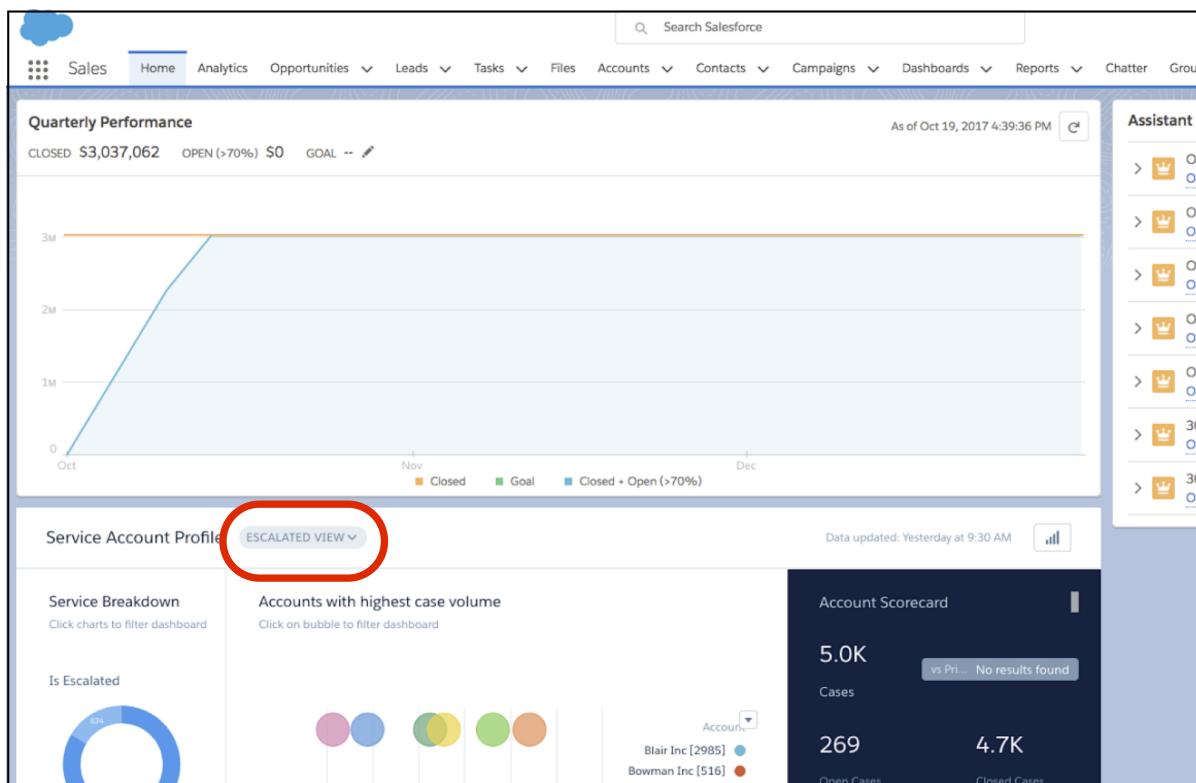
Review the latest updates to the REST API and associated representations. There are new endpoints to use dashboard saved views, work with dataflow jobs, and get information about assets.

[Enhanced SAQL Documentation](#)

[Enhanced documentation](#) to get you started writing SAQL queries. New content includes step-by-step examples and detailed explanations of the building blocks for typical a typical query.

Include the Views Menu with Embedded Analytics Dashboards

Gone are the days of creating multiple versions of one dashboard. With the Views menu, embedded dashboards give users the chance to set up dashboard filters and selections and save the views they want. The Views menu is now part of the dashboard header, whether embedded through Visualforce, Page Layouts, Lightning App Builder, or Communities Builder.



Take the following into consideration.

- Users can save and manage their own views only when the dashboard size is large enough to accommodate the menu.
- The only way to hide the Views menu in an embedded dashboard is to hide the dashboard header.
- The Views menu in the mobile app offers only read access. You can't save or delete views.

For more information about the Views menu, see [Save Your View of a Dashboard](#).

Bind Measures and Groupings in Spring '18 Charts

To bind measures and groupings for charts created in Spring '18, replace the `columnMap` section in the chart JSON with an empty `columns` property. The `columnMap` section supports the new chart builder by tracking the step's measure or grouping that maps to each chart widget-level property.



Note: This task isn't required for charts created before Spring '18. The widget JSON for existing charts doesn't contain the new `columnMap` section.

Let's look at an example. You create a donut chart in Spring '18 and now want to dynamically set the measure based on the selection in the static step (`MeasuresController_1`).



To implement this behavior, like in the previous releases, bind the measure in the step.

```
"PieByProduct_1": {
    "type": "aggregateflex",
    "label": "PieByProduct",
    "query": {
        "measures": [
            "{{ cell(MeasuresController_1.selection, 0, \"step_property\").asObject() }}"
        ],
        "groups": [ "Product" ]
    },
    "broadcastFacet": true,
    "isGlobal": false,
    "receiveFacet": true,
    "selectMode": "single",
    "useGlobal": true,
    "visualizationParameters": {
        "type": "chart",
        "parameters": {
            "visualizationType": "pie",
            ...
        },
        "options": {}
    },
    "datasets": [
        ...
    ]
}
```

```
{
  "id": "0FbB00000000q5gKAA",
  "label": "Flexy Sales",
  "name": "Flexy_Sales",
  "Url": "/services/data/v42.0/wave/datasets/0FbB00000000q5gKAA"
}
]
```

Because the chart is created in Spring '18, you also have to replace the `columnMap` section with an empty array for the `columns` property for the chart. Why? Because when you change the query, the set of fields will likely be different from what's in the `columnMap` section. When you replace the `columnMap` property with an empty `columns` array, the system remaps the columns based on the new query definition.

When you create the donut chart, by default, the widget JSON contains the `columnMap` section.

```
"chart_1": {
  "type": "chart"
  "parameters": {
    "step": "PieByProduct_1"
    "visualizationType": "pie",
    "columnMap": {
      "trellis": [],
      "dimension": [ "Product" ],
      "plots": [ "Sum_Amount" ]
    },
    ...
  }
}
```

 **Note:** The properties under the `columnMap` property vary based on the chart type.

To enable the binding to work, replace the `columnMap` section with an empty `columns` array.

```
"chart_1": {
  "type": "chart"
  "parameters": {
    "step": "PieByProduct_1"
    "visualizationType": "pie",
    "columns" : []
  }
}
```

Get Familiar with JSON Changes for Dashboard Designer

The dashboard JSON contains new and changed parameters that impact users who create the JSON from scratch.

Property	Description
columnMap	<p>This new widget property contains an array of properties that map measures and groupings in a step to specific chart properties, like Bubble Size and Segment By. Previously, measures and groupings were assigned to chart attributes based on the order that they were listed. For example, for a bubble chart, the first measure appeared on the x-axis and the second appeared on the y-axis. Now when you build the chart, you can explicitly select the measure or grouping that impacts each chart property—those widget-level details are tracked in this JSON property.</p> <p> Note: To bind a measure or grouping for a chart created in Spring '18, you have to replace the <code>columnMap</code> section with an empty <code>columns</code> property. For more information, see Bind Measures and Groupings in Spring '18 Charts.</p>
marker	<p>This new property contains an array of markers that appear in the chart. Each marker can have the following properties.</p> <p>backgroundColor Background color (hex color code)</p> <p>borderColor Border color (hex color code)</p> <p>showDimensions Shows the values of all selected dimensions.</p> <p>dimensions List of dimensions to show.</p> <p>showMeasures Shows the values of all selected measures.</p> <p>measures List of measures to show.</p> <p>defaultShow Indicates whether to open the marker and show its text, by default. Otherwise, the dashboard viewer must click the marker to view the text.</p> <p>isBlinking Indicates whether the marker blinks when it's closed.</p> <p>customText Enter your own text. Reference each field by its alias (not label), and enclose the alias in square brackets.</p>
missingValue	<p>This property supports the following new settings.</p> <p>cumulative For a missing data point, use the prior value to indicate no change. Use this option for charts that show cumulative values, such as timeline and time combo.</p> <p>cumulativeUntilLastData Similar to the cumulative option, except that the line ends at the last data point.</p>
tooltip (for a text or image widget)	Text that appears when you hover over a text or image widget. Use a tooltip to add context to the text or image.

Property	Description
tooltip (for a chart widget)	<p>This new property supports the following settings.</p> <p>showBinLabel Indicates whether to show a tooltip when you hover over any data point in the chart. The tooltip can show your own text and the values of measures and dimensions.</p> <p>showDimensions Shows the values of all selected dimensions.</p> <p>dimensions List of dimensions to show.</p> <p>showMeasures Shows the values of all selected measures.</p> <p>measures List of measures to show.</p> <p>showPercentage If you show measures, indicates whether to show each measure's percentage of the total.</p> <p>customizeTooltip Enter your own text. Reference each field by its alias (not label), and enclose the alias in square brackets.</p>
visualizationType	<p>This property supports the following values for the new chart types:</p> <ul style="list-style-type: none"> • time-bar • time-combo

This dashboard JSON snippet shows most of these properties.

```
"widgets": {
    "text_1": {
        "type": "text",
        "parameters": {
            "text": "Open Opportunities",
            "textAlignment": "center",
            "textColor": "#091A3E",
            "fontSize": 20,
            "tooltip": "Let's win these deals!"
        }
    },
    "chart_1": {
        "type": "chart",
        "parameters": {
            "visualizationType": "time-combo",
            "step": "Close_Date_Year_Clos_1",
            "missingValue": "cumulative",
            "tooltip": {
                "showBinLabel": true,
                "measures": [
                    "sum_Amount",
                    "sum_Probability"
                ]
            }
        }
    }
}
```

```

        "count"
    ],
    "showPercentage": true,
    "showDimensions": true,
    "showMeasures": true,
    "customizeTooltip": true,
    "dimensions": [ "Close_Date_Year~~~Close_Date_Week" ]
},
"markers": [
{
    "row": [ "2016~~~04" ],
    "measure": "count",
    "properties": {
        "backgroundColor": "#2EC2BA",
        "borderColor": "#9271E8",
        "dimensions": [ "Close_Date_Year~~~Close_Date_Week" ],
        "measures": [ "sum_Amount" ],
        "showDimensions": true,
        "showMeasures": true,
        "defaultShow": true,
        "isBlinking": true,
        "customText": "Nice job!"
    }
}
]
}
}
...

```

Updates to the REST API

Review the latest updates to the REST API and associated representations. There are new endpoints to use dashboard saved views, work with dataflow jobs, and get information about assets.

Create and Use Dashboard Saved Views

The following new endpoints allow a developer to create and use dashboard saved views.

/wave/dashboards/\${dashboardIdOrApiName}/savedviews

Dashboard Saved View endpoint for getting a collection of views or creating a single view.

/wave/dashboards/\${dashboardIdOrApiName}/savedviews/initial

Dashboard Saved View endpoint for getting the initial view information.

/wave/dashboards/\${dashboardIdOrApiName}/savedviews/\${viewId}

Dashboard saved view.

Work with Dataflows

The following new endpoints allow a developer to work with dataflows and dataflow jobs.

/wave/dataflows

Get a list of dataflows.

/wave/dataflows/\${dataflowId}

Get dataflow information.

/wave/dataflowjobs

Make a GET request to get a list of dataflow jobs.

Make a POST request with `request body: {"command": "start", "dataflowId" : "<dataflowId>"}` to start a dataflow job.

/wave/dataflowjobs/\${dataflowjobId}

Make a GET request with the `dataflowJobId` parameter to get the status of a dataflow job.

Make a PATCH request with the `dataflowJobId` parameter and `request body: {"command": "stop"}` to stop the dataflow job.

/wave/dataflowjobs?dataflowId=<dataflowId>

Get a list of dataflows for a specific dataflow.

Get Information About Assets

The following new endpoints allow a developer to view extended metadata (XMD) information about assets like lenses or dashboards.

/wave/assets/\${assetId}/xmds/asset

Extended metadata (XMD) that is associated with an asset such as a lens or dashboard.

General Updates

For more information about updated representations and properties, see the Analytics REST API Developer Guide.

Enhanced SAQL Documentation

[Enhanced documentation](#) to get you started writing SAQL queries. New content includes step-by-step examples and detailed explanations of the building blocks for typical a typical query.

Analytics Data Integration: New Connectors and Enhancements to the Dataflow Editor and Dataset Recipes

Connect to even more data with a host of new connectors. Spend less time in the dataflow editor thanks to productivity tweaks. Open up recipes to more people, and take advantage of enhancements to help you manage your recipes.

IN THIS SECTION:

[Connect to More Data with New Connectors and Revised Limits](#)

We added a slew of new connectors, including Windows Azure and Snowflake, and different flavors of Amazon RDS. Use a connector to create a connection to data stored in web-based database services. Analytics replicates this data, making it available for your dataflows and recipes. To get the most out of these new connectors, we removed the limit of 20 connections. Each connection now counts toward the maximum of 50 objects that you can replicate in Analytics.

[Do More in Less Time in the Dataflow Editor](#)

The dataflow editor now lets you rename nodes, override field attributes for Salesforce data, and propagate field changes to downstream nodes. When you're done, run your dataflow without even leaving the dataflow editor.

[Export Data to Einstein Discovery with the Export Transformation \(Generally Available\)](#)

The export transformation creates a data file and a schema file from data in a specified source node in your dataflow. After the dataflow runs, Einstein Discovery users can access these files in the Einstein Discovery Datasets tab.

[Take More Control of Data Preparation with Recipe Enhancements](#)

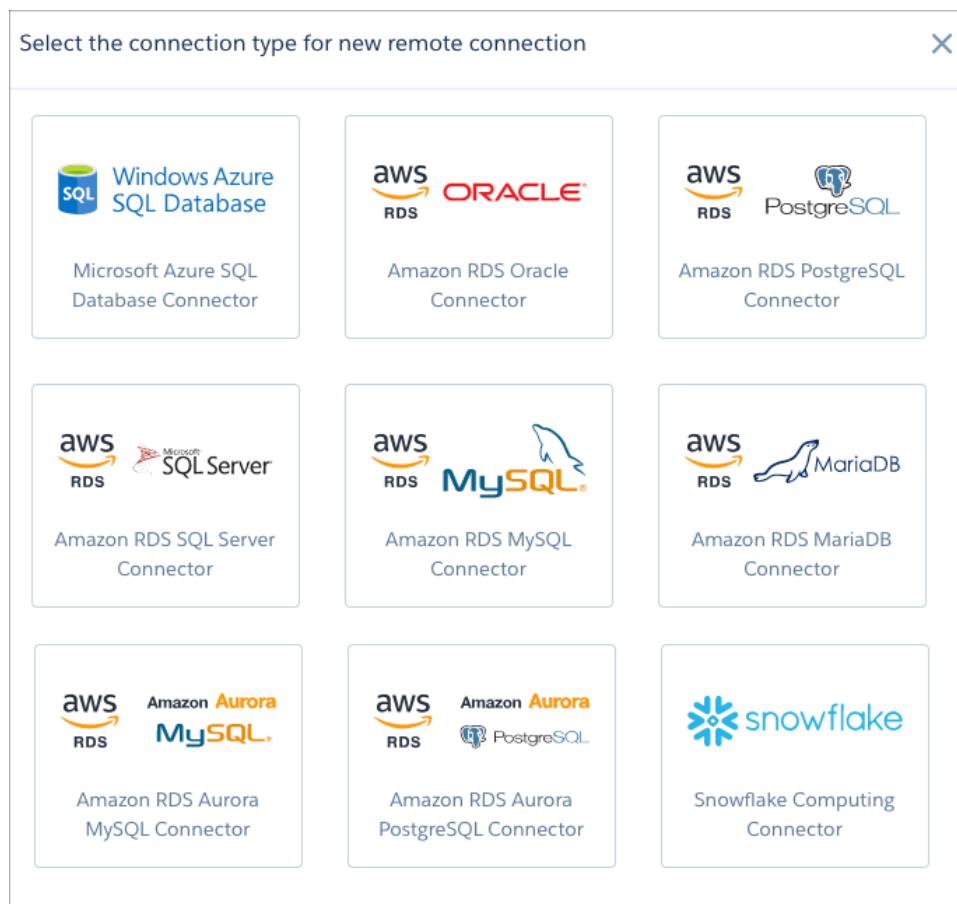
A new permission lets more people create recipes. Plus, you can now run and schedule recipes from the recipes list, quickly see what dataset your recipe is based on, and load replicated data faster.

[Get a Better View of Your Datasets](#)

Can't find a dataset in the data manager? Want to see your biggest datasets or the ones that nobody's using, all from the dataset list? We added search, sorting, and more metadata columns to the dataset list view to give you all you need at a glance. You can even see datasets in users' private apps.

Connect to More Data with New Connectors and Revised Limits

We added a slew of new connectors, including Windows Azure and Snowflake, and different flavors of Amazon RDS. Use a connector to create a connection to data stored in web-based database services. Analytics replicates this data, making it available for your dataflows and recipes. To get the most out of these new connectors, we removed the limit of 20 connections. Each connection now counts toward the maximum of 50 objects that you can replicate in Analytics.



Here's the list of new connectors.

- AWS RDS Aurora MySQL

- AWS RDS Aurora PostgreSQL
- AWS RDS MariaDB
- AWS RDS MySQL
- AWS RDS Oracle
- AWS RDS PostgreSQL
- AWS RDS SQL Server
- Microsoft Azure SQL Database
- Snowflake Computing

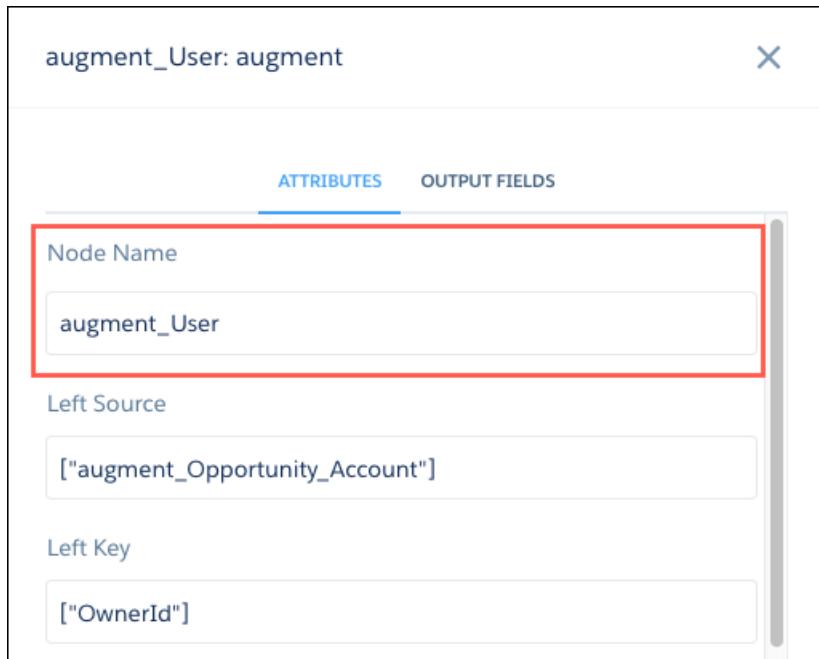
 **Note:** The new connectors are available on a rolling basis during the Spring '18 release.

Do More in Less Time in the Dataflow Editor

The dataflow editor now lets you rename nodes, override field attributes for Salesforce data, and propagate field changes to downstream nodes. When you're done, run your dataflow without even leaving the dataflow editor.

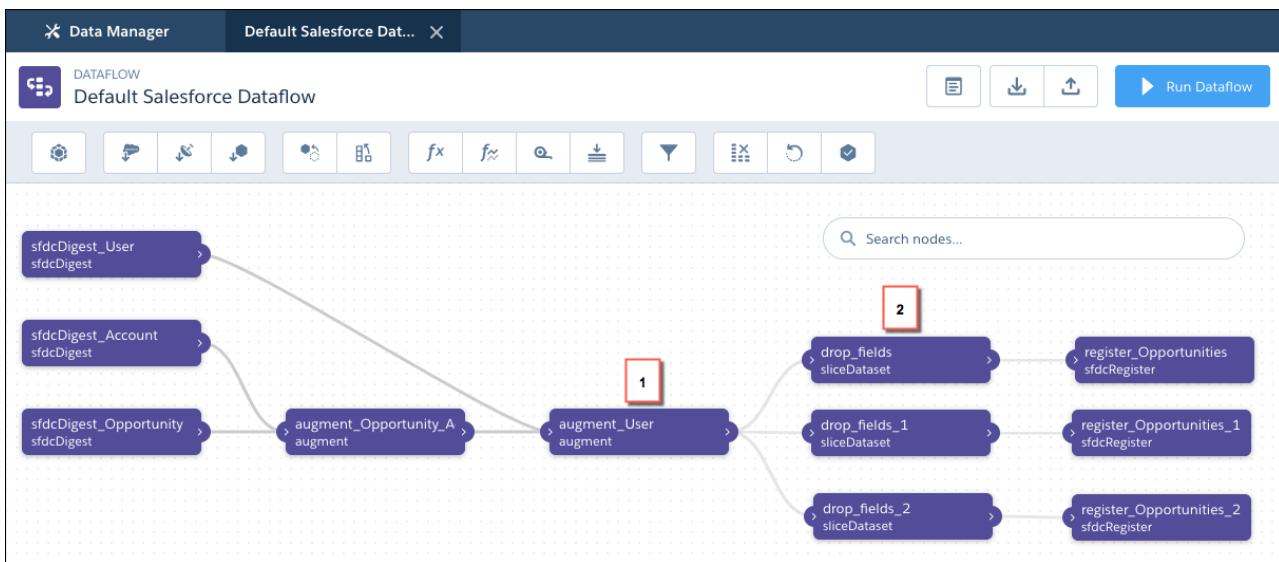
Rename Nodes

Changing the name of a node in the dataflow editor is now as easy as changing any other attribute. Click the node and change its name along with all its other attributes.



When you rename a node, Analytics validates that the new name is unique. It also changes the name in dependent downstream nodes for you.

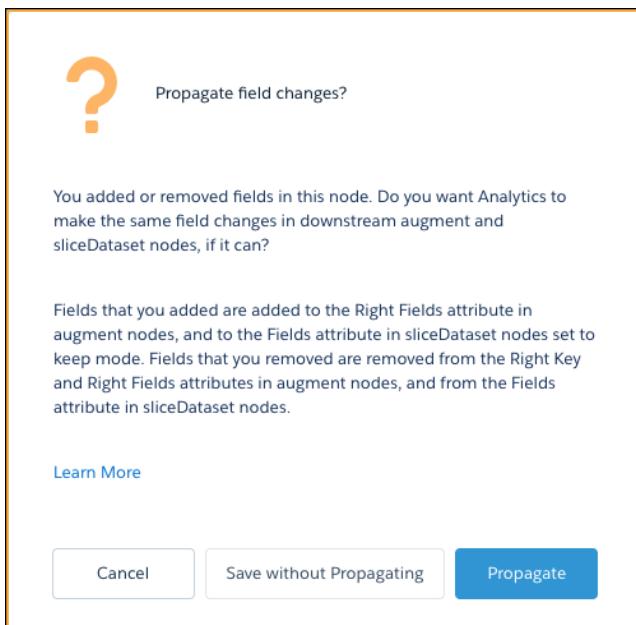
Here's an example. This dataflow extracts and augments Salesforce data and slices fields to create three datasets.



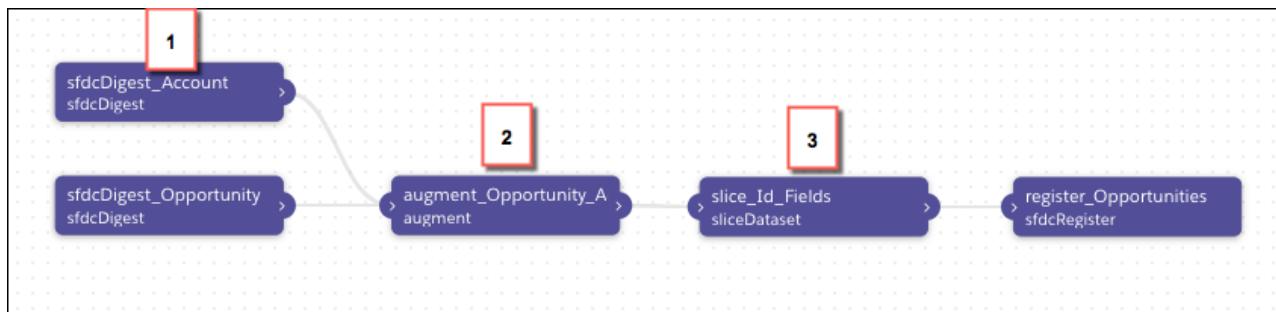
You want to rename the augment_User node (1) to augment_Owner. Previously, you had to delete the node and then recreate it with the new name. You also had to reestablish the joins to all dependent downstream nodes, such as the three sliceDataset nodes (2) in this example. Now, all you do is click the node, change the name, and save.

Propagate Field Changes

You probably add and remove fields in the dataflow editor fairly often. While Analytics does a good job of adding and removing these fields in downstream nodes, you might need to edit some nodes to reference your added fields or change references to fields that you've removed. We made this task easier by doing some of this work for you. When you add or remove a field in an existing node, Analytics offers to propagate the change to where it might be needed in downstream nodes.



In this dataflow, you're extracting Salesforce opportunity and account data. You're then augmenting the opportunity records with account records and removing Id fields with a sliceDataset node set to `Keep` mode.



When you add a field to the `sfdcDigest_Account` node (1), the new field can't make it all the way to the `register_Opportunities` node on its own. You need to add the field to the set of `Right Fields` in the `augment_Opportunities_Accounts` node (2) so that it gets added to each opportunity row. And if your `slice_Id_Fields` node (3) is set to `Keep` mode, you also need to add it there so that it's not dropped along the way. The propagate option takes care of this for you. Imagine how much time that's going to save you in more complex dataflows with multiple augments and slices.

But what about removing fields? When you remove a field from the `sfdcDigest_Account` node (1), the dataflow can fail if the field is referenced in a downstream augment (2) or sliceDataset node (3). Again, the propagate option takes care of this for you. It removes the field from augment nodes where it's referenced as a `Right Key` or `Right Field`, and from sliceDataset nodes.

You see the propagate option whenever you add or remove fields from these types of nodes:

- `sfdcDigest`
- `digest`
- `augment`
- `computeExpression`
- `computeRelative`
- `sliceDataset`

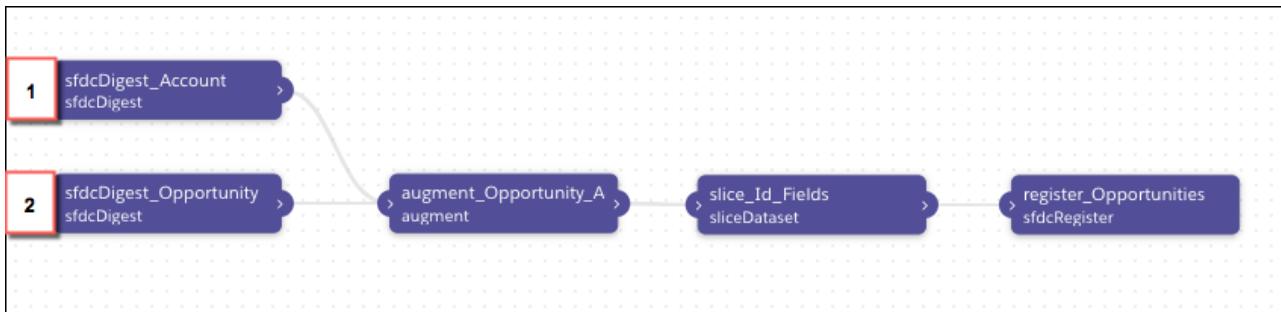


Note: Consider that when you remove a field from your dataflow, Analytics doesn't remove the field from downstream `computeExpression` or `computeRelative` nodes that reference it.

Override Field Attributes in `sfdcDigest` Nodes

You can now override the attributes of Salesforce fields extracted in `sfdcDigest` nodes. Change attributes, such as field type, default value, and precision, inside the dataflow editor. No more manual editing of the dataflow definition file to make these changes.

By default, Analytics uses the attributes set in Salesforce for a field, but these aren't always the ones you want in your datasets. Let's look at the example dataflow again to see how overriding these attributes can help you.



In this dataflow, you extract the AccountSource field in the sfdcDigest_Account node (1). This field has a lot of missing values, which you want to replace with the default value *Other*. When you click the node to edit it, you see that selected fields in an sfdcDigest node now appear in a list, rather than a box.

Fields	Select Fields
Name	Account Name
AccountSource	Account Source
Type	Account Type
BillingCountry	Billing Country

To override a field's attributes, just click the next to it. Make your changes, click **Save**, and you're done.

Override Field Attributes - AccountSource

Enter new values for the attributes that you want to override.

Field Name
AccountSource

Field Type
 Text

Default Value

Is Multivalue

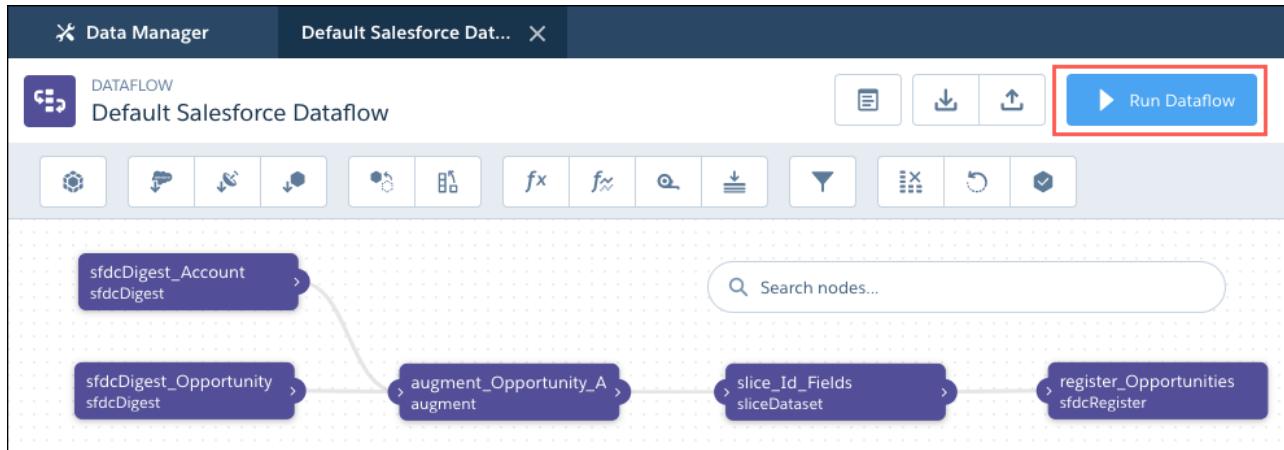
Precision

Also in the dataflow, you extract the Amount field in the sfdcDigest_Opportunity node. This field is set to two decimal places in Salesforce, but you want to reduce clutter in your datasets by not displaying decimal places. All you need to do is edit the node and set the field's scale to 0. Job done.

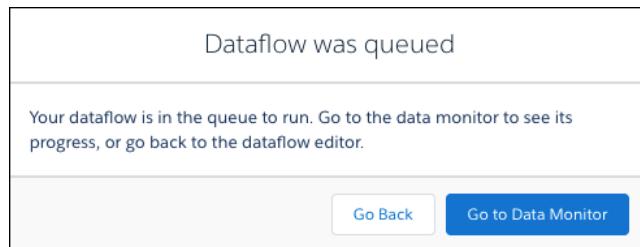
 **Note:** Changing a field's type attribute to anything other than Text can result in an error in your dataflow or unexpected values in your datasets. For example, if you change a text field to a numeric field, you see an error when you try to update the dataflow.

Run the Dataflow from the Dataflow Editor

You're making changes to your dataflow and running it after each change to test it. But you have to leave the dataflow editor and head over to the Dataflows & Recipes tab every time to run the dataflow. Not anymore. Now when you've updated the dataflow in the editor, you have the option to run it there and then.



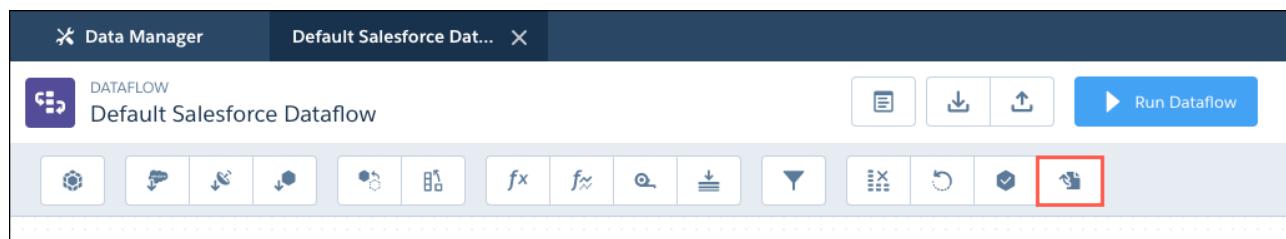
Analytics puts the dataflow in the queue and gives you the options to go back to your tinkering in the editor, or to jump over to the data monitor to check on progress.



Export Data to Einstein Discovery with the Export Transformation (Generally Available)

The export transformation creates a data file and a schema file from data in a specified source node in your dataflow. After the dataflow runs, Einstein Discovery users can access these files in the Einstein Discovery Datasets tab.

You can add an export node through the export button in the dataflow editor or manually in the JSON dataflow definition.



Here's an example. Let's say your dataflow contains the sfdcDigest node, `ExtractOpportunities`, which extracts all fields from the Opportunity object. To make this data available in Einstein Discovery, add an export node to the dataflow, specifying the source node and a target of `EinsteinDiscovery`. The user ID you specify determines who can access the data in Einstein Discovery.

export Node in Dataflow Editor

A screenshot of the Dataflow Editor showing the configuration for an "export" node. The "ATTRIBUTES" tab is selected. The "Node Name" field contains "ExportOpportunities". The "Source Node" field contains "[sfcdigest_Opportunity]". The "Target" field is set to "Einstein Discovery". The "User" field contains "[005R0000000IUBIIA4]".

export Node in Dataflow JSON

```
"ExportOpportunities": {
  "action": "export",
  "parameters": {
    "source": "sfcdigest_Opportunities",
    "target": "EinsteinDiscovery",
    "userId": "005R0000000IUBIIA4"
  }
}
```

 **Note:** The export transformation was previously available as a beta feature. It's now generally available in Salesforce orgs that have Einstein Discovery enabled.

Take More Control of Data Preparation with Recipe Enhancements

A new permission lets more people create recipes. Plus, you can now run and schedule recipes from the recipes list, quickly see what dataset your recipe is based on, and load replicated data faster.

Let More People Create Recipes

Recipes are so great that everybody wants to use them. Until now, you needed the Edit Analytics Dataflows permission to work with recipes, and that's a permission that you don't want to give to just anybody. So we introduced a new user permission, Edit Dataset Recipes. This permission lets users create and edit recipes without having access to things that you don't want them to touch, such as dataflows and replication.

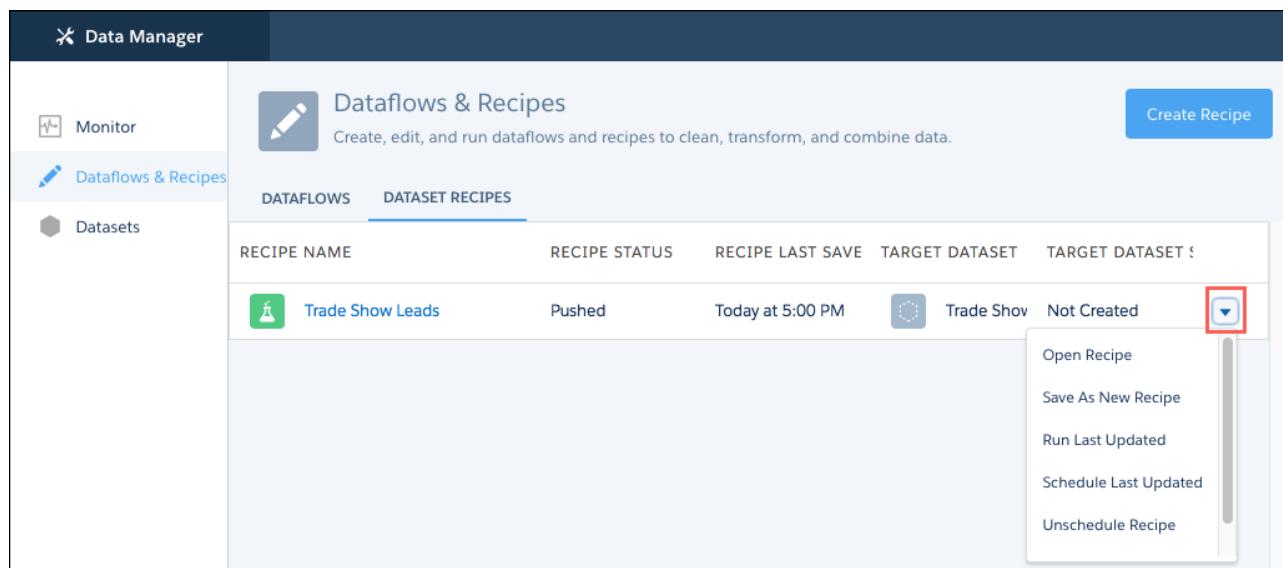
Users with the Edit Dataset Recipes permission can access the data manager, just like Edit Analytics Dataflows users, but can't access these areas:

- Dataflow View on the Monitor tab
- Dataflows subtab on the Dataflows & Recipes tab
- Replicated Datasets subtab on the Datasets tab
- Setup tab

The Edit Dataset Recipes permission is intended to give recipe access for personal use, so users can save a recipe only to their private app. For security purposes, the permission doesn't let users edit security predicates in existing recipes, or run and schedule recipes based on datasets that have security predicates. Only a user with at least the Edit Analytics Dataflows permission can run these datasets.

Run and Schedule Recipes from the Recipes List

You can now run and schedule a recipe from its actions menu, right in the recipes list in the data manager. Previously, you had to open the recipe and update it to get to the run and schedule options—time consuming if you have a long list of recipes to manage.

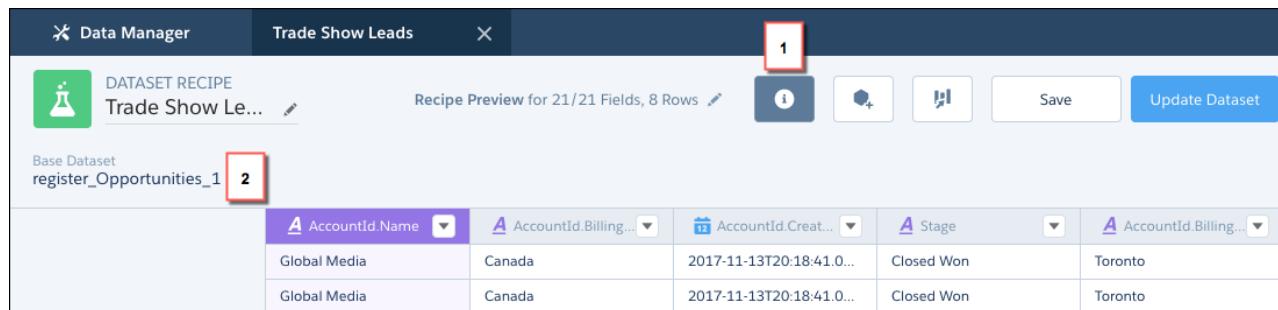


The screenshot shows the Data Manager interface with the 'Dataflows & Recipes' tab selected. On the left, there's a sidebar with 'Monitor', 'Dataflows & Recipes' (which is highlighted in blue), and 'Datasets'. The main area displays a table with columns: RECIPE NAME, RECIPE STATUS, RECIPE LAST SAVE, TARGET DATASET, and TARGET DATASET ?. A single row is visible for 'Trade Show Leads', which is in 'Pushed' status, last saved 'Today at 5:00 PM', and is targeting 'Trade Show' with 'Not Created' status. To the right of the table is a context menu with several options: 'Open Recipe', 'Save As New Recipe', 'Run Last Updated' (which has a red box around it), 'Schedule Last Updated', and 'Unschedule Recipe'.

 **Note:** From the actions menu, you can run or schedule the last updated version of a recipe. Recipes that you've edited and saved must be updated before you can run or schedule them here. If you've never run a recipe, the run and schedule options aren't available in the actions menu.

See What Dataset Your Recipe is Based On

The opportunity dataset that you created from a recipe last month looks a little stale. You go back to the recipe and run it to refresh the data. But the dataset is still stale. Looks like you need to refresh the source dataset that you created the recipe from. But wait. You have no idea what the source dataset is! Relax, we've got you covered. We added a button on the recipe page to show you the dataset.



AccountId.Name	AccountId.Billing...	AccountId.Creat...	Stage	AccountId.Billing...
Global Media	Canada	2017-11-13T20:18:41.0...	Closed Won	Toronto
Global Media	Canada	2017-11-13T20:18:41.0...	Closed Won	Toronto

To see which dataset or replication a recipe is based on, click the **Show Recipe Metadata** button (1). The base dataset name appears at the top of the recipe (2). Now you know which dataset you need to refresh.

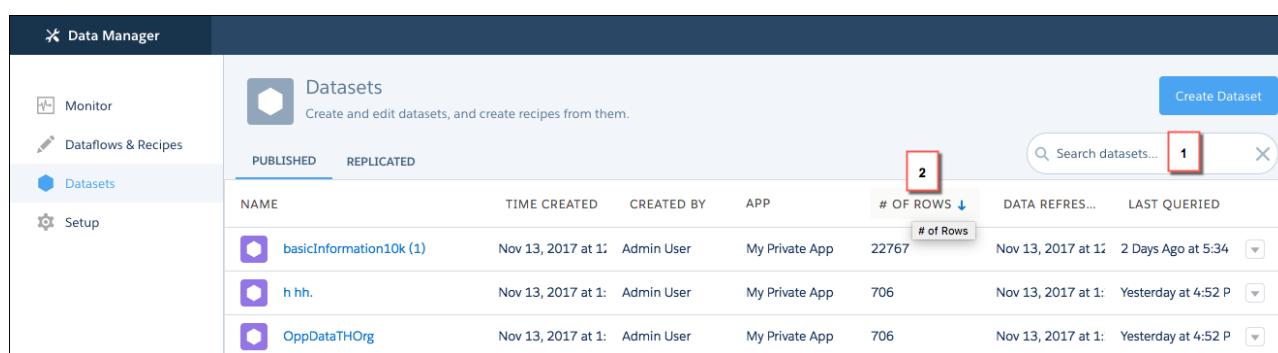
Knowing a recipe's base dataset is helpful in other scenarios, too. For example, knowing which dataset to go to to include new fields, change filters, or run a full extract.

Load Replicated Data Faster in Recipes

To improve performance, we changed how Analytics loads replicated data in a recipe. When you work with a replicated dataset of more than 10,000 rows, Analytics loads a sample of 10,000 rows into the recipe. You can prepare the data in the recipe as you've always done, but you don't see the option to change the sample size in the column profile.

Get a Better View of Your Datasets

Can't find a dataset in the data manager? Want to see your biggest datasets or the ones that nobody's using, all from the dataset list? We added search, sorting, and more metadata columns to the dataset list view to give you all you need at a glance. You can even see datasets in users' private apps.



NAME	TIME CREATED	CREATED BY	APP	# OF ROWS	DATA REFRES...	LAST QUERIED
basicInformation10k (1)	Nov 13, 2017 at 1:	Admin User	My Private App	22767	Nov 13, 2017 at 12	2 Days Ago at 5:34
hh.	Nov 13, 2017 at 1:	Admin User	My Private App	706	Nov 13, 2017 at 1:	Yesterday at 4:52 P
OppDataTHOrg	Nov 13, 2017 at 1:	Admin User	My Private App	706	Nov 13, 2017 at 1:	Yesterday at 4:52 P

Start typing a name in the search box (1) to see datasets that match. Click a column header (2) to sort by that column. View who created a dataset and when, the number of rows it has, and when it was last queried. If you have the Manage Analytics permission, datasets in users' private apps are listed here, too. So now you can see who's hoarding all the data!

 **Note:** Sorting works on all columns, except the APP column.

Search and sort are also available for replicated datasets.

Analytics Prebuilt Apps: New Dashboards, Deeper Data Analysis, Easier Setup and Customization

The latest enhancements to our prebuilt Analytics apps make it easier to get valuable insights from Salesforce data. Use the new dashboards and enhanced customization features to drill deep into your data, whether you're analyzing your field service, sales, or service businesses.

IN THIS SECTION:

[Prebuilt Apps Now Easier to Customize, Faster—plus More](#)

Point and click to enhance Sales Analytics and Service Analytics dashboards according to your unique needs—no code needed. And with global filters, dynamic time period selectors—and additional enhancements—both apps are faster and more powerful than ever.

[Deliver the Right Service at the Right Time with Field Service Analytics](#)

A new dashboard for service managers and another for technicians help the whole team keep on top of their customer interactions and deliver great service. Bundled with the Service Analytics app, Field Service Analytics gives managers and technicians just-in-time analytics to optimize the outcome of field service appointments. Intuitive visualizations give you a clear picture of your data to optimize outcomes of every service interaction.

[Put a Charge into Your Sales Team's Performance with Sales Analytics](#)

New dashboards, support for more data, more reliable app creation, easier dashboard embedding, plus detailed help make the app more powerful and easier to use.

[Create the App You Want—Precisely—with Streamlined Service Analytics Wizard](#)

The new wizard lets you choose between creating a basic and custom version of the app. It makes app creation simpler and more predictable. Service Analytics helps you discover actionable insights to improve every channel and customer conversation.

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Prebuilt Analytics apps helps your teams unlock the full power of Salesforce data. Sales Analytics focuses on Sales Cloud data, Service Analytics on the Service Cloud. With the apps' interactive dashboards based on best practice templates and KPIs, it's never been easier to build winning sales and service teams.

Enhancements to both Sales and Service apps

- **Point and click editing.** The apps have been reworked to allow for easier editing of dashboards. You can add, edit, and delete any part of a dashboard without ever having to touch any code.

USER PERMISSIONS

To use Analytics apps:

- Use Analytics Templated Apps
- Additional permissions as specified for each app

To create and manage Analytics apps:

- Manage Analytics Templated Apps
- Edit Analytics Dataflows

USER PERMISSIONS

To use the Sales Analytics app:

- Access Sales Cloud Analytics Templates and Apps

To use the Service Analytics app:

- Access Service Cloud Analytics Templates and Apps

- **Global filters.** To optimize performance and make dashboards even easier to customize, many dashboards now use global filters instead of list widget filters. Global filters let you filter different KPIs in the same dashboard—for example, the performance of two sales reps—with one filter. You can add, edit, or remove filters by editing the global filter panel. And dashboards load more quickly because global filters require fewer queries than the previous list widgets. See the sections for each app to see which dashboards use global filters.
- **Dynamic date picker.** We've switched from a custom data range picker to the standard date picker as part of the global filter. The new date picker removes JSON bindings from the app, which simplifies dashboard customization.

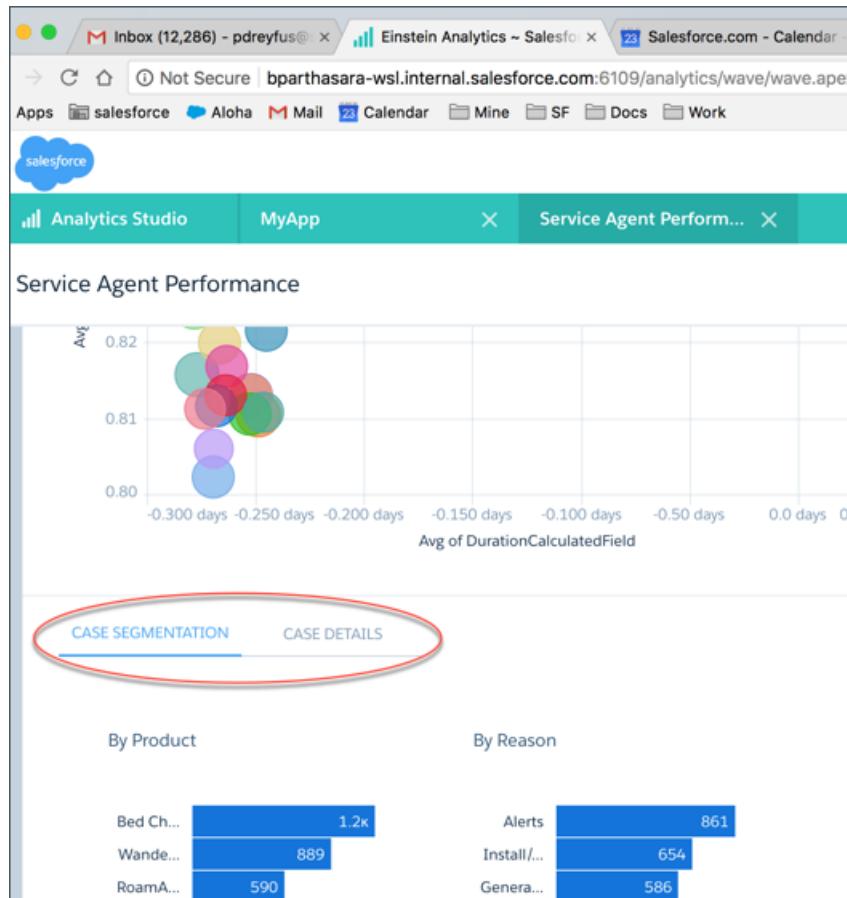
Sales Analytics enhancements

- **Precise time-period selection for the pipeline waterfall chart.** Dynamically choose the start and end period for pipeline comparison using a relative date selector widget.
- **Product schedule data.** Do your customers purchase your products according to payment schedules? If you do and track product schedules through Salesforce, you can now bring that data into the app.
- **Refreshed dashboards.** We've updated the content and look of the following:
 - **Sales Performance.** We've updated average deal size, win rate, and other KPIs. We've also added an opportunity values table to make it easier to perform Salesforce actions directly from the dashboard.
 - **Stage Analysis.** A new historical time frame filter lets you choose the time frame used for the historical time in stage calculation.
 - **Leaderboard.** A new created date filter lets you filter on both the created and the close date of opportunities. KPI comparisons versus same time last year have been changed to comparison of selected sales rep to team average.
 - **Sales Rep Overview.** Comparison KPIs have been removed with the addition of global filters, but the dashboard is fully editable using the point-and-click Analytics interface.
- **Dashboards with global filters.**
 - Sales Rep Overview
 - Accounts
 - Activities
 - Company Overview
 - Forecast
 - Leaderboard
 - Leads
 - Sales Performance
 - Stage Analysis
 - Team Benchmark
 - Trending
 - Whitespace

Service Analytics enhancements

- **Connected datasets.** Service Analytics uses the Analytics Connect Data Source feature to join datasets used in the Open Cases and Account Profile dashboards. Previously, these dashboards required bindings, which added complexity and slowed performance.
- **Dashboards with pages.** We've used Analytics pages to make dashboards cleaner and load more quickly. Toggle between segmentation breakdown and case detail views in these dashboards:
 - Account Profile
 - Agent Activity
 - Agent Performance

- Channel Review
- Knowledge Efficiency
- Open Cases



- **Dashboards with global filters.**

- Account Profile
- Agent Activity
- Agent Performance
- Backlog
- Channel Review
- Customer Satisfaction
- Knowledge Impact
- Live Agent Chat
- Omni
- Open Cases
- Telephony

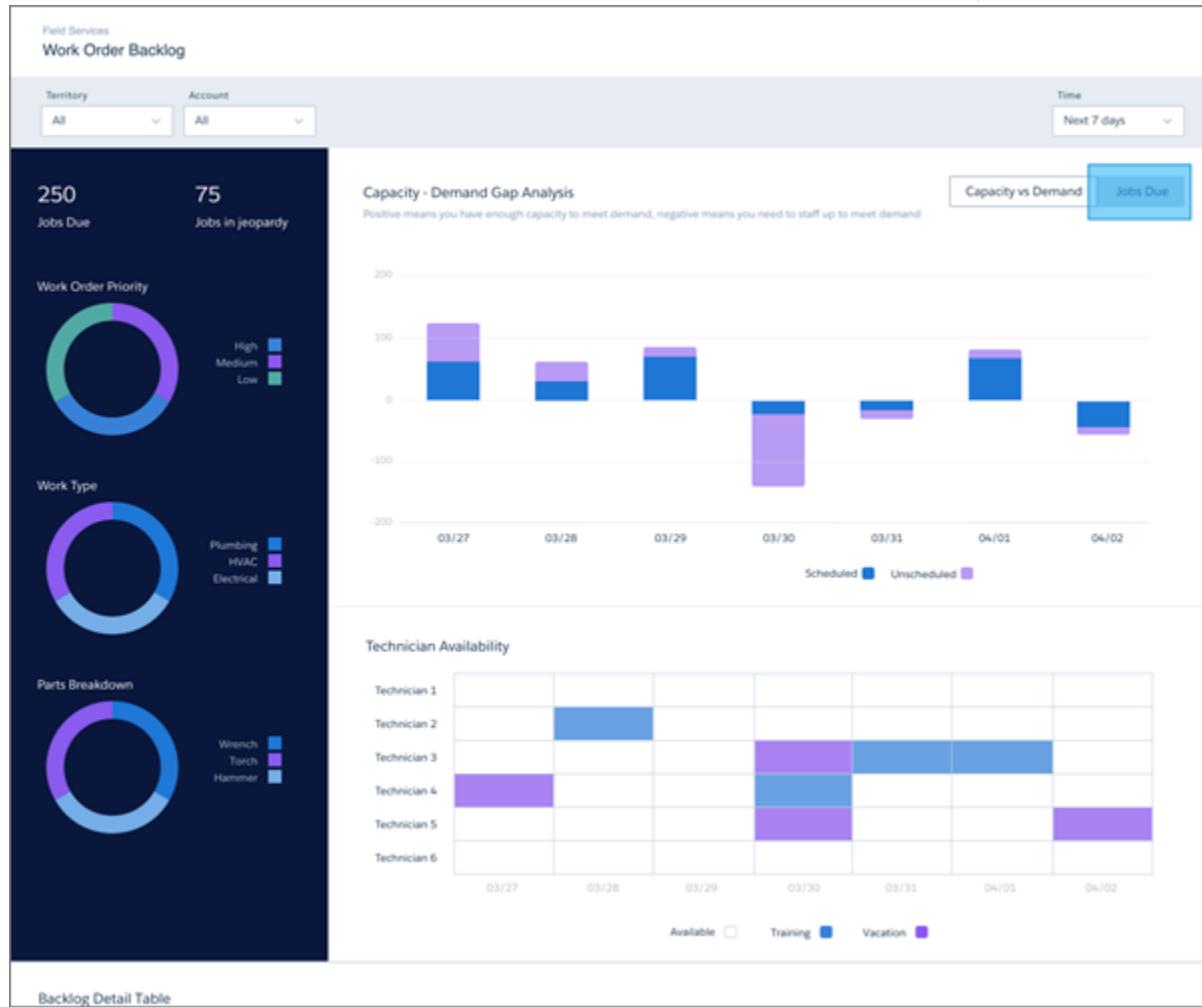
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USER PERMISSIONS

To use the Field Service Analytics app:

- Access Service Cloud Analytics Templates and Apps



We added dashboards to help service managers and technicians stay on top of their workloads and deliver personalized customer service that exceeds customer expectations.

- **Work Order Backlog.** Service managers get instant insight into the backlog to help deliver the right resources to the right cases at the right time. View the status of all open work to assign technicians according to priority or required skills. And anticipate and manage resource shortfalls so your customers always get what they need.
- **My Performance.** Service technicians can view their entire workload in a single dashboard. See the status and priority for all your work orders, broken down by type and product. Get instant insight into CSAT ratings for each order, and view first-time fix rates. You can also see how your SLA violation rate stacks up against the team's.

To use Field Service Analytics, your org must be enabled to use Field Service Lightning. App creation is easy. In Analytics Studio, select the Field Service Analytics template and click **Create**. Analytics does the rest and creates dashboards based on your Field Service Lightning data.

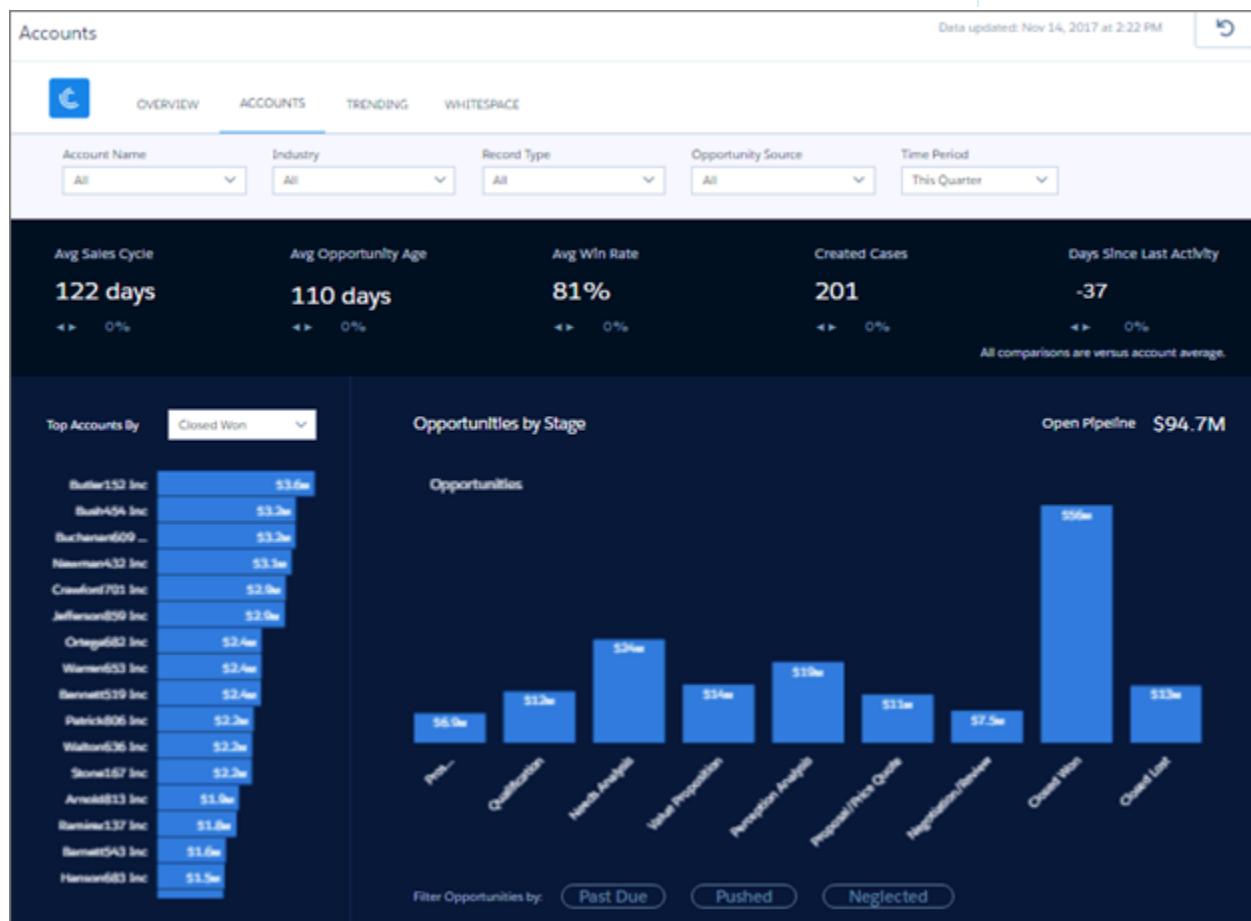
Put a Charge into Your Sales Team's Performance with Sales Analytics

New dashboards, support for more data, more reliable app creation, easier dashboard embedding, plus detailed help make the app more powerful and easier to use.

USER PERMISSIONS

To use the Sales Analytics app:

- Access Sales Cloud Analytics Templates and Apps



With every version of Sales Analytics, we build in features to turn data into ever-smarter sales and give your team tools to master the competition. Here's what's new.

- **Accounts dashboard.** Account managers can monitor activities on their accounts, including opportunities, activities, and cases.
- **Sales Rep Home dashboard.** The new dashboard, optimized for the Lightning Home page, shows sales reps their KPIs the minute they log in to Salesforce. You can add it to the Lightning Home page through the user interface without writing any code.

- **Account hierarchy support.** Now you have a way to report on this standard Salesforce feature. See how account KPIs roll up the account hierarchy.
- **Improved org compatibility check.** When the wizard checks your org's data before creating the app, you get more details. Follow specific guidance for what to add to your org or fix to enable app creation.
- **Easier dashboard embedding.** Embed the sales rep Account and Opportunity summary dashboards directly into Account and Opportunity Page layouts (in both Lightning Experience and Salesforce Classic) using clicks, not code.
- **Detailed dashboard help.** See details about each dashboard, including the calculations behind KPIs and how to use the wizard to personalize dashboards.

Those additions, plus support for custom amount fields in trending dashboards and the ability to drag filters into dashboards (no code required!), make Sales Analytics more powerful—and customizable.

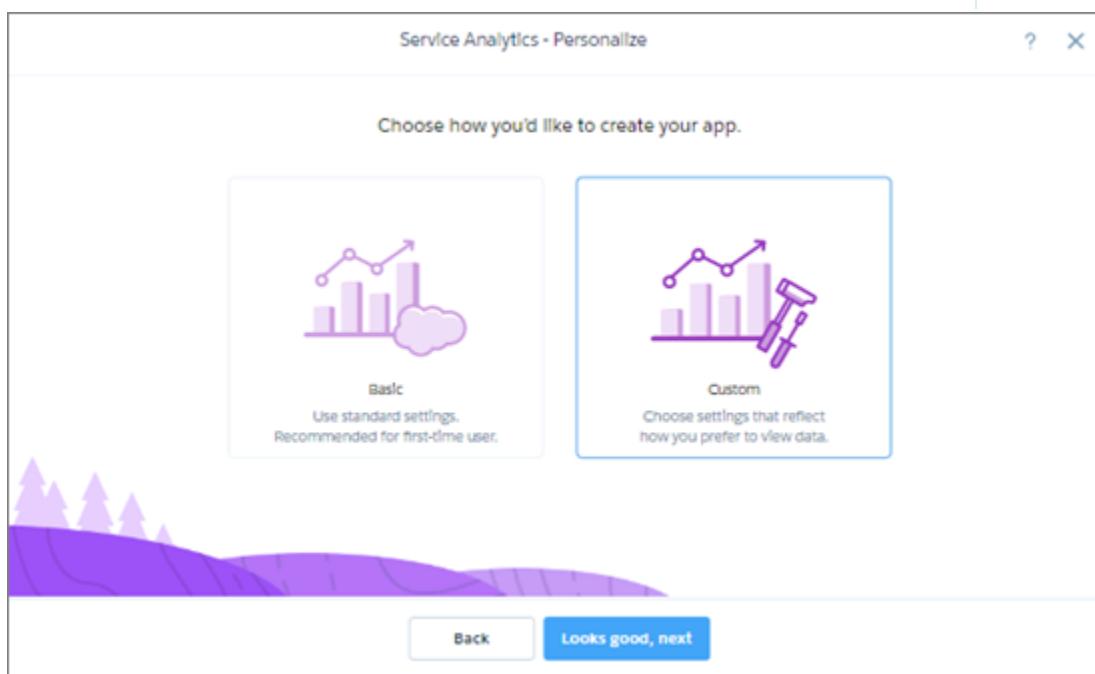
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The new wizard lets you choose between creating a basic and custom version of the app. It makes app creation simpler and more predictable. Service Analytics helps you discover actionable insights to improve every channel and customer conversation.

USER PERMISSIONS

To use the Service Analytics app:

- Access Service Cloud Analytics Templates and Apps



With the basic create option, you can create an app using default settings in just a few clicks. When you select custom create, you can add data and features to your app. Then answer detailed questions about how you track your service business and how you want to display data.

The wizard checks your org for the data required to create the app and for objects you can optionally add. It also checks field-level security and fiscal settings to ensure that they're accurately represented in the app. Error messages in the wizard help you fix anything that's wrong. And page-by-page help linked gives you detailed instructions for choosing wizard settings.

[Get started](#) with the app today.

Einstein Discovery: Einstein Data Insights (Pilot), Analytics Data Access

Introducing Einstein data insights (pilot): a smarter report. Einstein analyzes your report data to help you better understand it, revealing the insightful tidbits that you can act on! Plus, access more data more easily. Seamlessly use your Analytics data with Einstein Discovery. Upload and analyze data in languages that use UTF-8 encoding.

IN THIS SECTION:

[Einstein Data Insights: What Can Einstein Tell You About Your Report Data? \(Pilot\)](#)

Reports show you data, but what does the data mean? Wonder no more! Introducing Einstein Data Insights: a smarter report. Einstein analyzes report data and summarizes key takeaways, comparisons, and trends with insightful charts and metrics. It's one-click data science! This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Create Einstein Discovery Datasets from Analytics Dataflows](#)

Use an Einstein Analytics dataflow to create an Einstein Discovery dataset based on data from Salesforce objects, replicated objects, or existing datasets.

[Use UTF-8 Character Sets with Einstein Discovery](#)

Einstein Discovery now supports data that contains UTF-8 character encoding. You can upload and analyze data in any language that uses UTF-8 encoding, such as Arabic, Russian, or Hebrew.

[Display Einstein Discovery Recommendations in a Salesforce Object \(Pilot\)](#)

We are piloting native support for importing Einstein Discovery recommendations into a Salesforce object. Previously, it was necessary to install a managed package to enable the Writeback feature.

Einstein Data Insights: What Can Einstein Tell You About Your Report Data? (Pilot)

Reports show you data, but what does the data mean? Wonder no more! Introducing Einstein Data Insights: a smarter report. Einstein analyzes report data and summarizes key takeaways, comparisons, and trends with insightful charts and metrics. It's one-click data science! This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

 **Note:** We provide Einstein Data Insights to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Einstein Data Insights isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Here's how it works.

First, run a report. Then, to start an analysis click **Einstein Data Insights**.

Einstein analyzes all the data in your report, and none of the data that it doesn't, so be sure to include everything you're interested in. If you create a report that returns all opportunities, Einstein analyzes all opportunities. If you filter the report so that it doesn't return open opportunities, Einstein doesn't analyze open opportunities.

And when we say that Einstein analyzes all opportunities, we mean up to 500,000 opportunities and 25 columns! Einstein analyzes more than just the 2,000 records displayed in a report. Because Einstein includes so many records in each analysis, the insights you get are accurate, actionable, and amazing.

EDITIONS

Available in **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in **Developer** Edition.

Einstein does the analytic heavy lifting for you. You don't have to group report data, or summarize it, or chart it. (Though you certainly can if you'd like!) Einstein does it for you while analyzing your report data, and Einstein summarizes the key takeaways.

Let's see what Einstein has to say about a standard opportunity pipeline report.

The screenshot shows a Salesforce Sales Summary report for Opportunities. The main table lists various opportunities with columns for Opportunity Owner, Account Name, Employees, Amount, Probability (%), Type, Stage, and Industry. An Einstein analysis overlay on the right side highlights that 'Lead Source is Partner' occurs 57.3% of the time, which is 16.7% less often than average. It also suggests choosing 'Phone call' as the next step.

	Opportunity Owner	Account Name	Employees	Amount	Probability (%)	Type	Stage	Industry
1	Hank Chen	Global Media	14,668	\$70,000.00	10%	Existing Business	Prospecting	Media
2	Nadia Smith	Acme	680	\$500,000.00	90%	New Business	Negotiation/Review	Manufacturing
3	Nadia Smith	Acme	680	\$50,000.00	50%	Existing Business	Value Proposition	Manufacturing
4	Brian Alison	Acme	680	\$40,000.00	60%	Existing Business	Id. Decision Makers	Manufacturing
5	Fred Williamson	Global Media	14,668	\$20,000.00	60%	New Business	Id. Decision Makers	Media
6	Sarah Vasquez	Global Media	14,668	\$100,000.00	50%	Existing Business	Value Proposition	Media
7	Sarah Vasquez	Global Media	14,668	\$20,000.00	20%	New Business	Needs Analysis	Media
8	Sarah Vasquez	Acme	680	\$70,000.00	10%	Existing Business	Prospecting	Manufacturing
9	Sarah Vasquez	Acme	680	\$500,000.00	90%	New Business	Negotiation/Review	Manufacturing
10	Sarah Vasquez	Global Retail	10,000	\$50,000.00	50%	Existing Business	Value Proposition	Retail
11	Hank Chen	Global Retail	10,000	\$40,000.00	60%	Existing Business	Id. Decision Makers	Retail
12	Hank Chen	Global Media	14,668	\$70,000.00	100%	Existing Business	Closed Won	Media
13	Hank Chen	Global Retail	10,000	\$20,000.00	60%	New Business	Id. Decision Makers	Retail
14	Nadia Smith	Global Media	14,668	\$70,000.00	50%	Existing Business	Value Proposition	Media
15	Brian Alison	Acme	680	\$20,000.00	60%	Existing Business	Id. Decision Makers	Manufacturing
16	Brian Alison	Acme	680	\$100,000.00	100%	New Business	Closed Won	Manufacturing
17	Brian Alison	Acme	680	\$20,000.00	100%	Existing Business	Closed Won	Manufacturing
18	Brian Alison	Global Retail	10,000	\$50,000.00	20%	New Business	Needs Analysis	Detail

The top insight calls your attention to **Next Step** when **Lead Source is Partner**. It compares how often **Lead Source is Partner** occurs across all opportunities (57.3%) with how often **Lead Source is Partner** occurs when **Next Step is Phone Call** (40.6%). Looks like the rate significantly decreases. Let's brainstorm ways to get more partner-sourced opportunities to on the phone so we can close more deals!

You can also ask Einstein about numeric columns from the report. Here's an analysis about Amount. It looks at how Amount changes based on conditions drawn from other fields. Einstein again groups and re-groups, summarizes and re-summarizes, but focuses on average Amount instead of record count.

The screenshot shows the Salesforce Einstein Analytics interface. On the left, there's a 'Sales Summary' report with a table of opportunity data. The table has columns for Opportunity Owner, Account Name, Employees, Amount, Probability (%), Type, Stage, and Industry. The data includes rows for various users like Hank Chen, Nadia Smith, and Brian Alison across different accounts and industries. On the right, there's an 'OPPORTUNITIES' tab with an analysis card. The card features a cartoon Einstein character and text stating 'Here's an analysis about Amount. Focusing on: Amount is 140000'. Below this are tabs for EXPLORE, COMPARE, TREND, and QUALITY. Under EXPLORE, there's a chart titled 'Lead Source when Type is New Business' comparing 'OVERALL' and 'WHEN LEAD SOURCE IS WORD OF MOUTH'. It shows a significant difference of '+ 55K' in average amount. There are also dropdowns for 'CHOOSE A VALUE OF LEAD SOURCE' with options like 'Word of mouth', 'Advertisement', and 'Trade Show', and a toggle switch for 'Only Significant'.

It looks like average Amount is \$55,000 higher when Type is New Business and Lead Source is Word of Mouth. Hmmm...perhaps we should encourage our customers to promote our goods and services on social media?

So what do you think? What can Einstein tell you about your report data?

Create Einstein Discovery Datasets from Analytics Dataflows

Use an Einstein Analytics dataflow to create an Einstein Discovery dataset based on data from Salesforce objects, replicated objects, or existing datasets.

For more information, see [Export Data to Einstein Discovery with the Export Transformation \(Generally Available\)](#).

Use UTF-8 Character Sets with Einstein Discovery

Einstein Discovery now supports data that contains UTF-8 character encoding. You can upload and analyze data in any language that uses UTF-8 encoding, such as Arabic, Russian, or Hebrew.

The screenshot shows the Einstein Discovery interface. At the top, it says 'Einstein Discovery' and 'Dataset: CustAnonRussian'. Below that, it shows 'Created On: 12/1/2017', 'Columns: 9', and 'Rows: 24998'. The main area is a table with columns 'Type' and 'Field Name'. The 'Field Name' column contains several Russian text entries: 'Клиент', 'Статус клиента', 'Возраст', 'Пол', 'Канал приобретения', 'состояние', 'Доход домохозяйства', 'Время с 1_го по 2_е приобретение доходов', and 'доходов'. The entire 'Field Name' column is highlighted with a red border.

Display Einstein Discovery Recommendations in a Salesforce Object (Pilot)

We are piloting native support for importing Einstein Discovery recommendations into a Salesforce object. Previously, it was necessary to install a managed package to enable the Writeback feature.

Communities: Distributed Marketing, 1-to-1 Journeys, and New Support Components

Communities get an even jauntier spring to its step with an abundance of cool features. The Community Cloud is better integrated with the Marketing Cloud with two new features. Partner communities can now take advantage of distributed marketing, which allows partners to use preconfigured customizable campaigns when marketing new programs. Lightning communities can use personalized email journeys to help onboard community members and nurture relationships. Other fabulous additions include customer communities, which can now use the Contact Support Form and Case Deflection components together to help customers find solutions to their issues before they even file a case.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

Tip: There's lots of Lightning around Salesforce these days—Lightning Experience, Lightning Bolts, Lightning components—and it can be tricky to understand how it applies to Communities.

Lightning Bolt solutions and Lightning templates use the same underlying technology as Lightning Experience—namely, the Lightning platform and Lightning components. However, you aren't required to enable Lightning Experience to use them.

IN THIS SECTION:

[Put Power of AI in Your Community with Einstein Answers \(Pilot\)](#)

When your customers come looking for answers in your community, they want accurate results that solve their issues quickly. Einstein Answers is here to help. When a community member asks a question, Einstein Answers looks through articles and past discussions in your community. After sifting through your community's data, Einstein Answers suggests answers to the community member's question. Power users, known as Answer Champions, review and rate the suggested answers and post good ones to the community.

[Market to Your Members with Journey Builder for Communities \(Generally Available\)](#)

Drumroll please: the Community Cloud and Marketing Cloud Integration we introduced as a beta feature in Winter '18 is now generally available. With Journey Builder, you can create customer journeys across email, mobile, ads, and the web. With the Community Cloud integration, community and marketing managers can place community members on rich customer journeys, boosting engagement and driving activity in the community. You must have both Community and Marketing Cloud licenses to use this feature.

[Lightning Communities: New Support Components, More Granular Audience Definitions, and a Streamlined Theming Experience](#)

Give your community more power in deflecting cases, set audiences at the component level, customize communities faster with theming, connect your external CMS with your community, and so much more.

[Security: Easy Deactivation and Stricter Login Requirements](#)

We want your community experience to be as safe and secure as possible. Trust is our number-one priority, after all. So we made it easier for external users to deactivate their accounts.

[Usability Improvements: Account Role Optimization, Language Settings, and More](#)

Check out the major usability improvements that we packed into this release. Account role optimization helps you minimize the number of roles used for customer and partner community accounts. In addition, we moved language settings into Community Builder so they are easier to find and use. And enhancements to SEO help customers and search engines find the information and answers they're looking for quickly. We also start you in Workspaces instead of Community Management to improve your access to new features for managing your community.

[Chatter in Lightning Communities: Rich Content Editor on Mobile, Notifications for Group Mentions, and Share Via Link](#)

Add style to your mobile feeds. Get in-app notifications when your group is mentioned. Share links to posts. And harness your unique expertise when the questions you're most qualified to answer are delivered right to you.

[Partner Communities: Calendars, Scorecards, Campaign Marketplace, and More Guided Setups](#)

Campaign Marketplace provides channel marketers with a place to share preapproved marketing campaigns with partners so that they can drive demand for their supplier's products or services. Partner scorecards help channel account managers track their account performance against a set of KPIs. Partners and vendors can use calendars to track and share events. And new guided setups make it easy for your admins to set up channel programs and scorecards, Campaign Marketplace, and Intelligent Sales Enablement.

[New Guided Setups: Channel Programs, Campaign Marketplace, and Intelligent Sales Enablement](#)

New guided setups take your channel programs even further. We walk you through setting up channel programs and scorecards, creating a campaign marketplace, and setting up files and libraries for Intelligent Sales Enablement. You can also access a curated list of community app extensions to find even more solutions for your partner community. You need a Partner license to access Guided Setup from Community Workspaces.

[Community Analytics: Case Deflection and Sentiment Analysis Dashboards](#)

Two new dashboards show how well your community is deflecting cases and give you a feel for your community's overall sentiment. The dashboards are available in the Spring '18 Community Management Package on the AppExchange, available soon after the release.

[Files in Lightning Communities: Navigate Libraries with Tiles, Allow Standard Users to Create Assets, and Collaborate with Quip](#)

Updates and new features in Files in Lightning Communities make it easier to work with files and libraries. The new tile-based Libraries and Files Experience makes it easier to navigate your libraries and get to the files and folders you need. Quickly access your most recent asset files, allow standard users to create assets, and provide customers with a way to create asset files that unauthenticated users can access. Give your team a way to preview files on the go, use integrated search to fine. Quip integration opens up a whole new world of collaboration.

[Other Changes in Communities](#)

Learn about smaller changes that improve your experience with communities.

Put Power of AI in Your Community with Einstein Answers (Pilot)

When your customers come looking for answers in your community, they want accurate results that solve their issues quickly. Einstein Answers is here to help. When a community member asks a question, Einstein Answers looks through articles and past discussions in your community. After sifting through your community's data, Einstein Answers suggests answers to the community member's question. Power users, known as Answer Champions, review and rate the suggested answers and post good ones to the community.

! **Important:** We provide Einstein Answers to customers through a pilot program that requires agreement to specific terms and conditions. To participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Einstein Answers isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

The screenshot shows a community platform interface. On the left, a user named Fabio has asked a question: "What kind of maintenance does an electric car need?". The question includes a description: "I got a new electric car. I used to do all of the maintenance on my other cars, like change the oil and oil filter etc. But this is different. What do I need to do? What can I do? Do I need to change the oil?". Below the question is a "CAR REPAIR AND MAINTENANCE" category tag. There are buttons for "Upvote", "Answer", and "Share", and a note that it has "1 view". A text input field says "Write an answer...". On the right, there is a sidebar titled "Suggested Answers (2)". It shows a suggestion from Jessica Wilcox (Customer) from yesterday at 10:11 AM. The suggestion states: "Originally answered 'What types of maintenance are required on a tesla?' Electric cars don't require regular oil changes like normal cars and have a pretty light maintenance schedule mainly for tire rotations and inspections." Below this is a "Hide feedback" link and a "Thanks for your feedback!" message with five green stars. Further down is an article card for "Maintenance on your Electric Car" published on Nov 29, 2017. The article notes: "Electric cars have one of the least intensive maintenance needs of any car and doesn't require things like regular oil changes needed for typical internal combustion vehicles. Manufacturers also offer a variety of maintenance plans for customers which are described here." A "View article" link and a "RATED ★★★★" button are also present.

Other new features work with Einstein Answers to give your community the most responsive Q&A experience possible. For example, [top-five questions](#) steer topical questions with lots of engagement to the person most qualified to answer them. The combination of [likes](#) and [upvotes](#) ensures that engagement is gauged accurately.

All the data gathered by Einstein Answers, including ratings, feedback, posting of suggested answers, and end-user behavior are used to improve suggested answers when customers ask questions in the future. The more you use it, the smarter it gets.

Market to Your Members with Journey Builder for Communities (Generally Available)

Drumroll please: the Community Cloud and Marketing Cloud Integration we introduced as a beta feature in Winter '18 is now generally available. With Journey Builder, you can create customer journeys across email, mobile, ads, and the web. With the Community Cloud integration, community and marketing managers can place community members on rich customer journeys, boosting engagement and driving activity in the community. You must have both Community and Marketing Cloud licenses to use this feature.

For example, say you want to connect with new members when they join the community. You can create an email journey that automatically sends them personalized emails. Include information about uploading a picture or getting the most out of the community experience. Useful emails drive retention and boost participation.

Trigger a personalized journey with events, or choose a specific audience.

Events include:

- New community membership
- Case creation
- New Chatter group membership (new in Spring '18)
- New Chatter post creation
- New question on a topic or new topic on a post (new in Spring '18)

Audiences include:

- Members with the highest number of reputation points
- Members who belong to the same Chatter group
- Members who have not contributed in the last specified number of days
- Members who have registered for a community event

To get started, make sure that you have Marketing Cloud Connect set up so the two clouds can work together. Creating and working with the emails and journeys is done in the Marketing Cloud.

Lightning Communities: New Support Components, More Granular Audience Definitions, and a Streamlined Theming Experience

Give your community more power in deflecting cases, set audiences at the component level, customize communities faster with theming, connect your external CMS with your community, and so much more.

IN THIS SECTION:

[Update Your Lightning Community](#)

We revamped Lightning communities! Improvements include an audience dropdown menu at the component level, and improved performance on some components. All future improvements to the Lightning community templates will be made on the Spring '18 version, so don't get left behind.

[Build and Brand Your Community Faster](#)

Customizing your community's appearance is now faster with a new, streamlined theme management experience that brings all your visual configuration controls into one place. Spend less time setting up your community and more time helping your customers. Want a new page layout? Quickly and safely change page layouts and page variations, and update your site. This feature is available for use in Lightning communities and Lightning Bolt solutions.

[Quickly See Which Theme Layout a Page is Based On](#)

Know at a glance and a click how many and which pages are associated with your theme layouts.

[Create and Manage CMS Connect \(JSON\) Connections and Content More Easily](#)

Easily define and display your externally sourced content fed by JSON connections. CMS Connect (JSON) is now more versatile and mappable in Workspaces. Define up to five JSON connection types, each with up to 10 lists and one item mapped. This component is available for use in Lightning communities and Lightning Bolt solutions.

[Use Named Credentials with JSON connections in CMS Connect \(Beta\)](#)

Use Named Credentials with your JSON connections to bring secure content from external systems, like Sitecore, Drupal, or Wordpress, into your community. This component is available for use in Lightning communities and Lightning Bolt solutions.

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Access Salesforce calendars from your Lightning community, and share your calendar with others. Use the new Calendar component to view your events and other users' calendars directly from your community on your desktop or mobile device. You can set up a calendar to show details in the side panel or hide it by default. You can also share your My Events calendars with other team members and add their calendars to your view.

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Your community members are a valuable part of your business—and they have valuable opinions. Salesforce Surveys lets you create customized surveys to gather important data from your customers. Tap into your community's fount of knowledge and experience by embedding custom surveys into community templates with the Survey component. This component is available in Lightning communities and Lightning Bolt solutions.

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When your customers have a problem with a product, nothing is more frustrating than not finding a solution right away. Keep your customers happy and help them find what they need quickly. When customers create a case in the Contact Support Form, they see potential solutions, such as articles or previous community discussions, in Case Deflection. When they click the content, they can decide to abandon their form. Or, if they haven't solved their issue, continue creating the case. Use these components in Lightning communities and Lightning Bolt solutions.

[Fill in Contact Information in Snap-Ins Chat for Your Community Members](#)

Help your community members chat with a support agent faster. You can set their name and email to automatically fill in the pre-chat form when they request a chat, as long as they're logged in. The Snap-ins Chat component lets your community members start a live web chat with a support agent. This change applies to both Lightning Experience and Salesforce Classic.

[Organize Your Community's Content Up to Eight Levels with Navigational Topics](#)

Navigational topics are a fantastic tool to organize your community's content for your members. Previously, you were limited to three levels of content organization—a parent, a child, and a grandchild topic. Now you can go up to eight levels and organize to your heart's content. It's now much easier to match your community topic hierarchy to your actual product catalog, which may go deeper than three levels.

[Assign Audiences to Page Components](#)

You can now assign most audience criteria to individual components on a page, making it that much easier to get the right content in front of the right members.

[Use CRM Fields to Target Audiences](#)

We just gave superpowers to the User audience criteria. Select your way to fields on CRM objects, like contacts or accounts, and create audience criteria that you can apply to pages, branding sets, and components. Drill in up to four levels, and get to the field that you really want. Now you can target your audience with awesome precision.

[Use More Components with More Templates](#)

Get more out of the Partner Central and Customer Account Portal templates by having access to even more components to use with each template.

Update Your Lightning Community

We revamped Lightning communities! Improvements include an audience dropdown menu at the component level, and improved performance on some components. All future improvements to the Lightning community templates will be made on the Spring '18 version, so don't get left behind.

! **Important:** Before updating to the Spring '18 version, make sure that you check out [Update Your Community](#), which explains how the update can affect your community. These updates might affect your custom CSS. See [Migrate CSS Overrides](#) to see specific selector changes. Then do a test run in a sandbox before updating it in your production org. This help topic can be outdated or unavailable during release preview, so check back to ensure that you understand the full impact of the update. If you didn't update your community last release (Winter '18), check out this [release note](#) with important information.

Here's a list of what to expect when you update your current Lightning community to the Spring '18 version.

- A dropdown menu to set audiences at the component level
- Out-of-the-box UI enhancements, such as font sizing
- Upgraded, high-performance Reputation Leaderboard, Trending Articles by Topic, Related Articles, and Record Layout for custom object record detail pages
- A new Theme panel that redesigns the Branding Panel in Community Builder
- Additions to Theme settings that help you easily see which pages a theme layout is associated with
- Updated CMS Connect (JSON) to allow for authenticated content
- CMS Connect (JSON) autocreating detail pages for content lists
- More metadata options to improve discoverability of pages through SEO

Yes, we know that it's a lot of changes. That's why we're strongly urging you to test the upgrade process in a sandbox environment before publishing to your community.

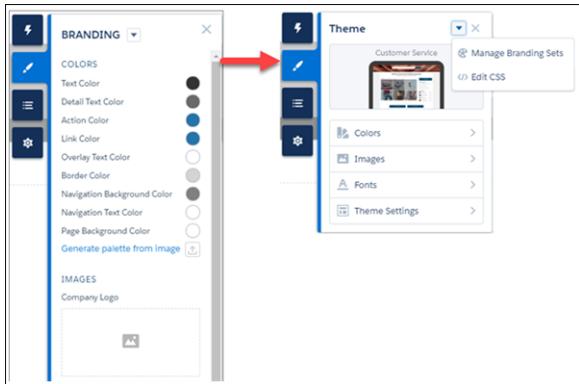
SEE ALSO:

- [Salesforce Help: Update Your Community's Template](#) (can be outdated or unavailable during release preview)
[Build and Brand Your Community Faster](#)
[Create Multilingual Communities in Community Builder](#)

Build and Brand Your Community Faster

Customizing your community's appearance is now faster with a new, streamlined theme management experience that brings all your visual configuration controls into one place. Spend less time setting up your community and more time helping your customers. Want a new page layout? Quickly and safely change page layouts and page variations, and update your site. This feature is available for use in Lightning communities and Lightning Bolt solutions.

Where once there was Branding, now there is Theme, with all the same options but in a new compact and easier-to-navigate set of menus. With a whole lot less scrolling, manage colors, images, fonts, and theme settings. Or, from any of these panels, work with your custom CSS or branding sets.

**SEE ALSO:**

[Salesforce Help: Your Community with Community Builder](#) (can be outdated or unavailable during release preview)

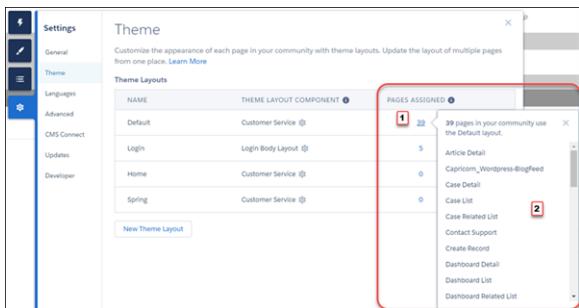
[Salesforce Help: Manage Your Community's Pages and Their Properties in Community Builder](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Update Your Community's Template](#) (can be outdated or unavailable during release preview)

[Create Multilingual Communities in Community Builder](#)

Quickly See Which Theme Layout a Page is Based On

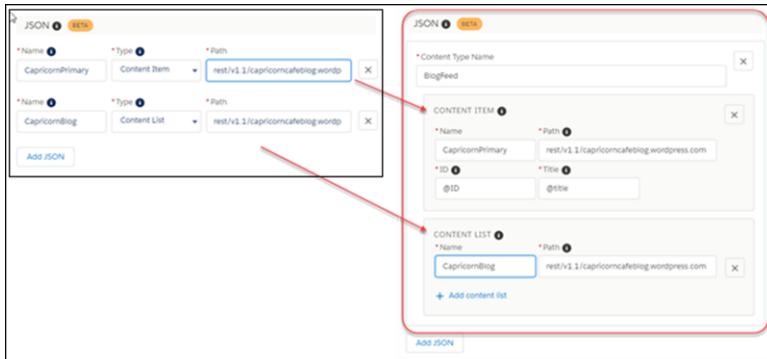
Know at a glance and a click how many and which pages are associated with your theme layouts.

**SEE ALSO:**

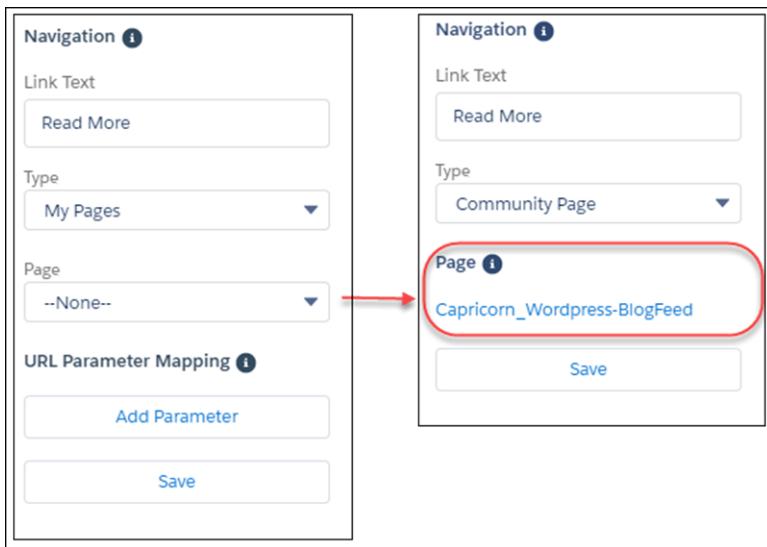
[Salesforce Help: Change the Theme Layout of Your Community's Pages](#) (can be outdated or unavailable during release preview)

Create and Manage CMS Connect (JSON) Connections and Content More Easily

Easily define and display your externally sourced content fed by JSON connections. CMS Connect (JSON) is now more versatile and mappable in Workspaces. Define up to five JSON connection types, each with up to 10 lists and one item mapped. This component is available for use in Lightning communities and Lightning Bolt solutions.



After your initial setup in Workspaces, check out the CMS Connect (JSON) component in Community Builder. Your community autogenerates the detail page for your content list, making it super easy to display the content you want.



SEE ALSO:

[Developer Guide: Add CMS Connect \(JSON\) Components to Your Community Pages](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Connect JSON Content from Your CMS to Your Community](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create a CMS Connection](#) (can be outdated or unavailable during release preview)

Use Named Credentials with JSON connections in CMS Connect (Beta)

Use Named Credentials with your JSON connections to bring secure content from external systems, like Sitecore, Drupal, or Wordpress, into your community. This component is available for use in Lightning communities and Lightning Bolt solutions.

1. Open Community Workspaces.
2. Click **CMS Connect**.
3. Click **New CMS Connection** (if no connections have been created yet in your community) or **New**.
4. For **Name**, enter a friendly name for the connection. The name shows up in your CMS workspace and other internal areas. (An API name is created for the connection behind the scenes, based on the name you enter.)
5. Select your CMS source: AEM, Drupal, SDL, Sitecore, Wordpress, or Other.



Note: The “Other” option isn’t fully supported. However, if your CMS server isn’t listed, CMS Connect works if you set it up properly. CMS Connect works with the HTML, CSS, and HTTP standards and isn’t provider-specific.

6. If Select **Authenticated** as your **Connection Type** (Beta) (1). Once you choose **Authenticated** you can then select a **Named Credential** (2) to access your external management system. Authenticated connection types only work with JSON, no other methods will be available when **Authenticated** has been selected.

The screenshot shows the 'Connection Details' configuration screen. At the top, there's a 'Name' field containing 'MyConnection' and a 'CMS Source' dropdown set to 'Other'. Below these, the 'Connection Type' dropdown is highlighted with a red box and the number '1'. It contains the options 'Authenticated' and 'Anonymous'. The 'Authenticated' option is selected. To the right of this dropdown is another dropdown labeled 'Named Credential' with a red box and the number '2'. This dropdown lists several named credentials: '--None--', 'blogspot', 'Google books', 'Google Drive' (which is currently selected and has a hand cursor icon over it), 'test', and 'HerokuApp'. There are also other fields like 'JSON' (labeled 'BETA'), 'Add JSON', 'Language Mapping', and a checkbox for 'Enable language mapping'.



Note: Named credentials need to have been previously created in your Salesforce settings. Both anonymous and named principal protocols are supported. See https://help.salesforce.com/articleView?id=named_credentials_define.htm.

Contact Support to enable this beta feature.

7. Enter the rest of the JSON information as you would for any other JSON connection and then choose it when adding content to pages in Community Builder.

SEE ALSO:

[Salesforce Help: Define a Named Credential](#) (can be outdated or unavailable during release preview)

[Developer Guide: Add CMS Connect \(JSON\) Components to Your Community Pages](#) (can be outdated or unavailable during release preview)

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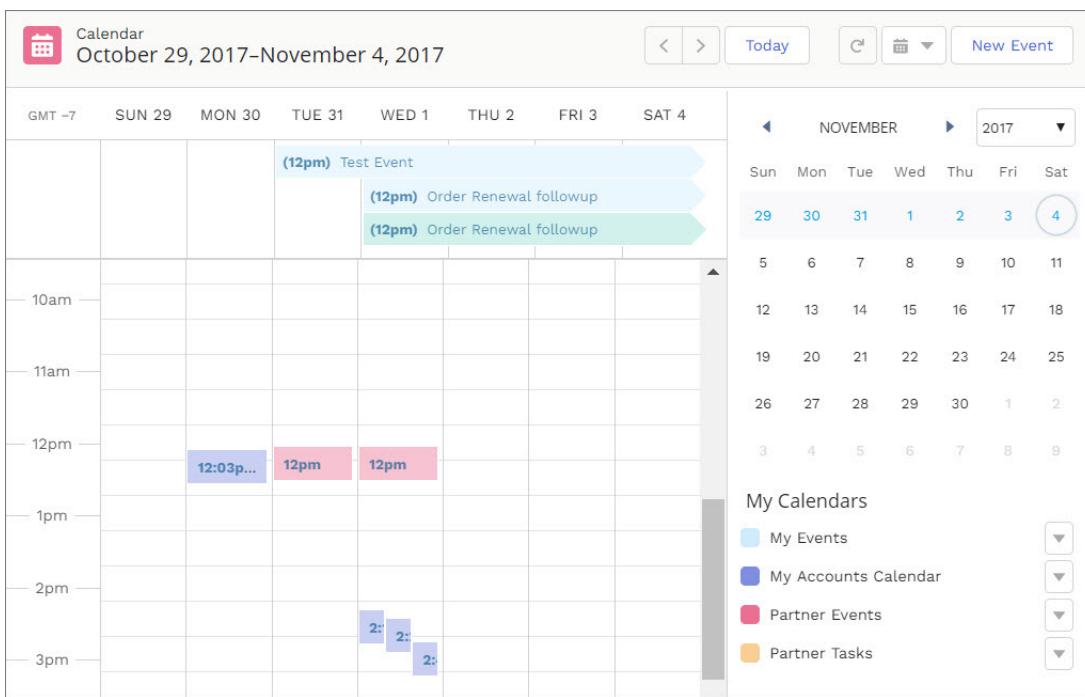
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Keep Track of Events with Community Calendars

Access Salesforce calendars from your Lightning community, and share your calendar with others. Use the new Calendar component to view your events and other users’ calendars directly from your community on your desktop or mobile device. You can set up a calendar to show details in the side panel or hide it by default. You can also share your My Events calendars with other team members and add their calendars to your view.

If you have a Customer Community Plus and Partner Community license, you can create events from the calendar.

 **Note:** Your admin has the option of letting users create new calendars. If this is enabled on your calendar, you can create new calendars for different salesforce objects and customize their color scheme.



 **Note:** There are some limitations when viewing calendars from a mobile device. For full functionality, use the desktop version of Salesforce.

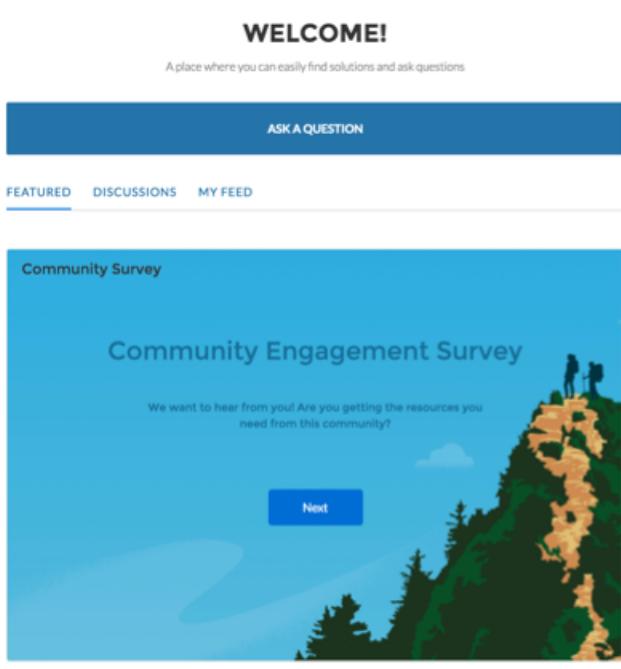
SEE ALSO:

[Salesforce Help: What are the Gaps Between Lightning Experience and Salesforce Classic](#) (can be outdated or unavailable during release preview)

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Your community members are a valuable part of your business—and they have valuable opinions. Salesforce Surveys lets you create customized surveys to gather important data from your customers. Tap into your community's fount of knowledge and experience by embedding custom surveys into community templates with the Survey component. This component is available in Lightning communities and Lightning Bolt solutions.

The Survey component embeds an active survey into any Lightning community template. When your community members log in, they have the option to participate in the survey.



All the valuable data that you collect is stored in Salesforce, so you can run reports and gain insights right from the app. The Survey component is available in the Spring '18 versions of all Lightning community templates.

 **Note:** To access the Survey component, first enable Salesforce Surveys in your org.

Help Customers Find Answers—and Deflect Cases—with Two New Components

When your customers have a problem with a product, nothing is more frustrating than not finding a solution right away. Keep your customers happy and help them find what they need quickly. When customers create a case in the Contact Support Form, they see potential solutions, such as articles or previous community discussions, in Case Deflection. When they click the content, they can decide to abandon their form. Or, if they haven't solved their issue, continue creating the case. Use these components in Lightning communities and Lightning Bolt solutions.

The two new components simplify and replace the Create Case Form component. They are the default components in communities built with the Winter '18 version of the Customer Service (Napili) template.

To use these components together, create a new default Contact Support page variation with a two-column layout. Drag the Contact Support Form and the Case Deflection components on the page.



Tip: Here are some things to consider when you're using these support components:

- Web-to-Case must be enabled in your org for these components to work properly for guest users. Web-to-Case isn't necessary for communities with only authenticated users.
- The Contact Support Form uses Files rather than Attachments, so you can add multiple files to a case.

SEE ALSO:

[Know How Well Your Community Deflects Cases](#)

Fill in Contact Information in Snap-Ins Chat for Your Community Members

Help your community members chat with a support agent faster. You can set their name and email to automatically fill in the pre-chat form when they request a chat, as long as they're logged in. The Snap-ins Chat component lets your community members start a live web chat with a support agent. This change applies to both Lightning Experience and Salesforce Classic.

Organize Your Community's Content Up to Eight Levels with Navigational Topics

Navigational topics are a fantastic tool to organize your community's content for your members. Previously, you were limited to three levels of content organization—a parent, a child, and a grandchild topic. Now you can go up to eight levels and organize to your heart's content. It's now much easier to match your community topic hierarchy to your actual product catalog, which may go deeper than three levels.

Add up to 25 navigational topics and 10 subtopics for each topic. Each subtopic can also have 10 subtopics. You can create five more levels of subtopics with the API, for a combined maximum of 2,775 navigational topics and subtopics per community.



Note: This functionality is only available via the [Chatter REST API](#) and [Chatter in Apex](#).

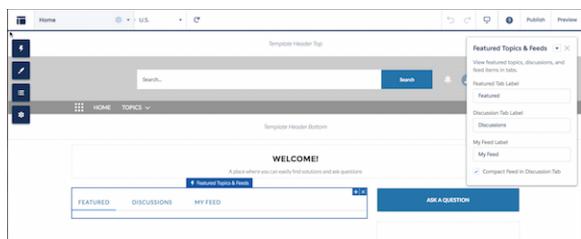
SEE ALSO:

[Salesforce Help: Set Up Navigational Topics](#) (can be outdated or unavailable during release preview)

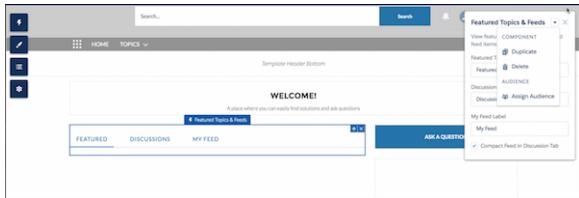
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You can now assign most audience criteria to individual components on a page, making it that much easier to get the right content in front of the right members.

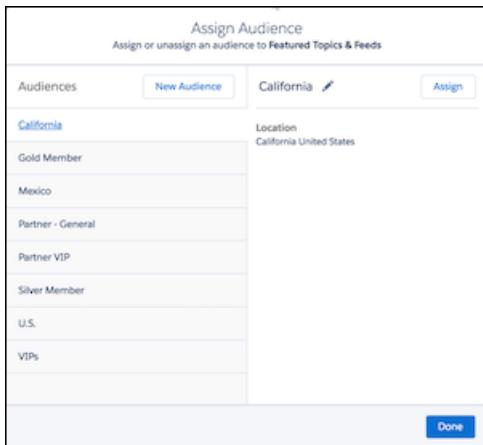
Say that you have a page that's assigned to customers in the U.S., but you want different topics and feeds to appear for customers in California. Go to the page in Builder, and click the component. Check out the blue outline.



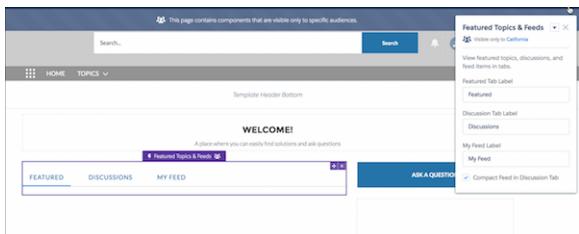
Click the arrow next to the component name, and select **Assign Audience**. You can delete or duplicate a component using the same dropdown.



Choose California from the list of audiences, click **Assign**, and then click **Done**.



That's it! Notice that the header component's outline is now purple and the audience icon appears next to the name. A note at the top of the page states that at least one component has a specific audience. The component details lists the audience.



You can use just about any audience criteria for your component, except Record Type. You can't assign audiences to components in the template header and template footer sections.

Use CRM Fields to Target Audiences

We just gave superpowers to the User audience criteria. Select your way to fields on CRM objects, like contacts or accounts, and create audience criteria that you can apply to pages, branding sets, and components. Drill in up to four levels, and get to the field that you really want. Now you can target your audience with awesome precision.

Let's look at how it works. Say that you want to set up your community so different pages appear to different departments. First, create an audience, then click the dropdown next to **User**.

New Audience
Define criteria for your audience. Then use the audience to control who sees what.

Audience Name
Audience Name

Profile
Location
Domain

User Object
Set visibility based on user object fields.

User > Select... Contact >

+ Add

Cancel Save

Selecting **Contact** opens another dropdown with more options.

New Audience
Define criteria for your audience. Then use the audience to control who sees what.

Audience Name
Audience Name

Profile
Location
Domain

User Object
Set visibility based on user object fields.

User > Contact > Department

+ Add

Marketing

Cancel Save

Next, select **Department** and then enter the criteria. Give your audience a name, and you're ready to start assigning.

New Audience
Define criteria for your audience. Then use the audience to control who sees what.

Audience Name
Marketing

Profile
Location
Domain

User Object
Set visibility based on user object fields.

User > Contact > Department

Enter criteria...

+ Add

Cancel Save Save & Assign

Or say that you have a partner community. Imagine that your company sells in multiple countries. You want to show a different home page to partners based both on location and the type of channel the partner represents. You can use the same process we describe for department. This time, use the Location criteria to specify location and the User criteria to hone in on the channel partner type.

Use More Components with More Templates

Get more out of the Partner Central and Customer Account Portal templates by having access to even more components to use with each template.

You can now use the following components in communities using the Customer Account Portal template:

- Compact Feed
- Lead Inbox
- Member Profile and Settings

- Reputation Leaderboard
- Search Results
- Snap-ins Chat
- Topic Metrics
- Trending Topics
- User Profile Detail
- Wave Dashboard

The Customer Account Portal now also includes Feed Detail and Question Detail pages.

You can use these components with the Partner Central template:

- Article Content
- Ask Button
- Breadcrumbs
- CMS Connect (JSON)
- Compact Feed
- Featured Topics
- Follow Button
- Message Notification
- New Message Button
- Related Articles List
- Related Questions List
- Related Topics List
- Reputation Leaderboard
- Snap-ins Chat
- Tabs
- Top Articles by Topics
- Topic Catalog
- Trending Articles
- Trending Articles by Topic
- Trending Topics

SEE ALSO:

[Salesforce Help: Objects Supported by Out-of-the-Box Components and Pages in Community Templates \(can be outdated or unavailable during release preview\)](#)

Security: Easy Deactivation and Stricter Login Requirements

We want your community experience to be as safe and secure as possible. Trust is our number-one priority, after all. So we made it easier for external users to deactivate their accounts.

IN THIS SECTION:

[Enable Community Users to Self-Deactivate](#)

Let external community users deactivate their own accounts. Allowing self-deactivation can comply with certain regulatory requirements.

[Verify Community External Users' Identity](#)

When external users access a Salesforce community from a new device or browser, you can verify their identity as an extra measure of security. Two-factor authentication helps ensure that unauthorized users don't access your community.

[Set Different Login Policies for Salesforce and Community Users \(Beta\)](#)

If you have a community set up in your org, you can now specify different login policies for internal users. Control access to the Salesforce app and communities separately, which lets you relax device activation and IP constraints for internal, trusted users to provide a better login experience. For example, you can set up less restrictive access policies for employees that log in to your community, but external users are subject to profile IP restrictions.

[Sharing Sets for All Customer and Partner Licenses—Pilot](#)

We've extended sharing sets to users with role-based community licenses, specifically the Customer Community Plus and Partner Community licenses. Yes, you read that right! Previously, only Customer Community users could use sharing sets, which didn't carry over when the user was upgraded to the Customer Community Plus license. Now, Customer Community Plus users can retain sharing sets in addition to using org sharing, such as sharing rules and role-based sharing. Partner Communities can also use sharing sets for the first time.

Enable Community Users to Self-Deactivate

Let external community users deactivate their own accounts. Allowing self-deactivation can comply with certain regulatory requirements.

SEE ALSO:

[Enable External Users to Self-Deactivate](#)

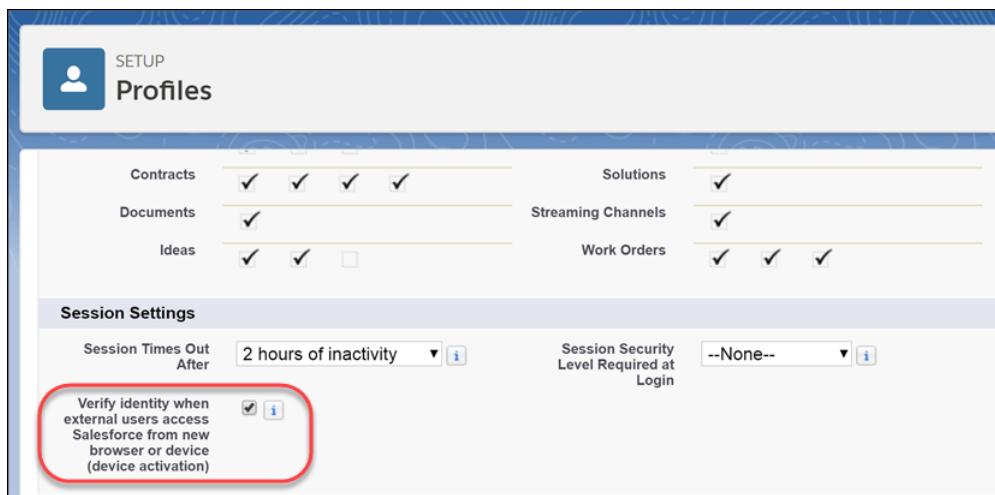
Verify Community External Users' Identity

When external users access a Salesforce community from a new device or browser, you can verify their identity as an extra measure of security. Two-factor authentication helps ensure that unauthorized users don't access your community.

In Setup, in the Quick Find box, enter *Profiles*, and then edit an external user's profile. Under Session Settings, select **Verify identity when external users access Salesforce from new browser or device (device activation)** and save the profile.

Editions

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



 **Note:** External users are users with Customer Community, Customer Community Plus, Partner Community, or External Identity licenses. This change also applies to legacy portal licenses.

Set Different Login Policies for Salesforce and Community Users (Beta)

If you have a community set up in your org, you can now specify different login policies for internal users. Control access to the Salesforce app and communities separately, which lets you relax device activation and IP constraints for internal, trusted users to provide a better login experience. For example, you can set up less restrictive access policies for employees that log in to your community, but external users are subject to profile IP restrictions.

Editions

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

 **Note:** As a beta feature, Separate Login Policies for Salesforce and Community Users is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Separate Login Policies for Salesforce and Community Users in the [Salesforce Identity group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

 **Note:** Salesforce admins can't create communities after enabling this option on their profile.

1. In Setup, in the Quick Find box, enter *Profiles*, and then edit an internal user's profile.
2. Under Session Settings, select **Separate community and Salesforce login authentication for internal users**.
3. To set less restrictive login policies, select **Relax profile login IP restrictions** or **Skip verifying identity when internal users access community from new browser or device (device activation)**, or both.
4. Save the profile.



Sharing Sets for All Customer and Partner Licenses—Pilot

We've extended sharing sets to users with role-based community licenses, specifically the Customer Community Plus and Partner Community licenses. Yes, you read that right! Previously, only Customer Community users could use sharing sets, which didn't carry over when the user was upgraded to the Customer Community Plus license. Now, Customer Community Plus users can retain sharing sets in addition to using org sharing, such as sharing rules and role-based sharing. Partner Communities can also use sharing sets for the first time.

Access granted to users via sharing sets does not roll up to users higher to them in their role hierarchies. Also, the Share Groups functionality isn't available to users with Customer Community Plus and Partner Community licenses.



Note: We provide Sharing Sets for Role-Based Community Licenses to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Sharing Sets for Role-Based Community Licenses isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Usability Improvements: Account Role Optimization, Language Settings, and More

Check out the major usability improvements that we packed into this release. Account role optimization helps you minimize the number of roles used for customer and partner community accounts. In addition, we moved language settings into Community Builder so they are easier to find and use. And enhancements to SEO help customers and search engines find the information and answers they're looking for quickly. We also start you in Workspaces instead of Community Management to improve your access to new features for managing your community.

IN THIS SECTION:

[Call Workspaces Home](#)

When you log in to your community, you now land in Workspaces instead of Community Management. For many of you, Workspaces is familiar territory as it's been available for a while now. But if you're not, don't worry: All the things you used to do in Community Management are here. So are all the new features, like Community Pulse, that make managing your community even easier.

[Optimize Account Roles to Improve Performance and Scale Your Org](#)

Minimizing the number of roles you use for customer and partner community accounts can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single community user. In this scenario, all accounts with one community user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles.

[Create Multilingual Communities in Community Builder](#)

You no longer have to go to Site.com Studio to create multilingual communities. Language controls are available in Community Builder settings.

[Improve SEO for Your Community Pages](#)

Dynamically include Salesforce object information and additional metadata to help customers and search engines find the information and answers they're looking for quickly. This feature is available for use in Lightning communities and Lightning Bolt solutions.

[Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

We're stabilizing the hostname of Visualforce, Community Builder, Site.com Studio, and content file URLs by removing instance names from URLs. This critical update applies to orgs that have a deployed My Domain. It will be activated automatically on March 16, 2019.

Call Workspaces Home

When you log in to your community, you now land in Workspaces instead of Community Management. For many of you, Workspaces is familiar territory as it's been available for a while now. But if you're not, don't worry: All the things you used to do in Community Management are here. So are all the new features, like Community Pulse, that make managing your community even easier.

SEE ALSO:

[Salesforce Help: Community Pulse \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Your Community with Community Workspaces \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Access Community Workspaces \(can be outdated or unavailable during release preview\)](#)

Optimize Account Roles to Improve Performance and Scale Your Org

Minimizing the number of roles you use for customer and partner community accounts can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single community user. In this scenario, all accounts with one community user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles.

When the first role-based community user is provisioned for a customer or partner community account, a shared person role is created. This role is used instead of your org's default number of community roles, and it rolls up to the account owner. When you provision a user to another account with the same account owner, the shared person role is used.

Account role optimization interacts with customer communities and partner communities independently. If an account has a single customer community user and two partner community users, account role optimization applies only to the customer community user. The customer community user is assigned to the shared customer community person role. Each partner user is individually assigned to one of the account's partner community roles. This feature doesn't affect role usage for person accounts.

! **Important:** After you enable account role optimization, you can't disable it.

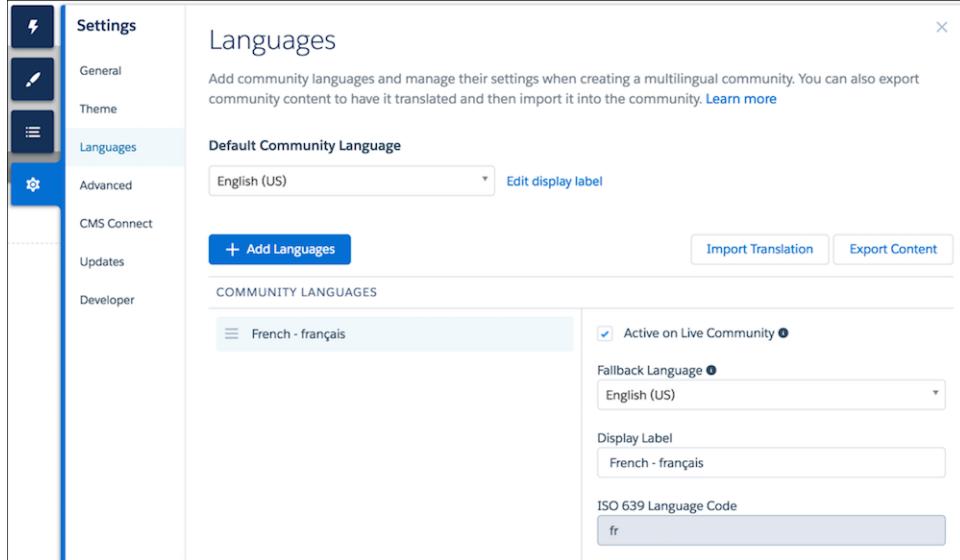
1. Contact Salesforce Customer Support to enable account role optimization. After this feature is enabled, edit your Sharing Settings.
2. From Setup, enter *Sharing Settings* in the Quick Find box and select **Sharing Settings**.
3. In the Other Settings section, enable **Optimize Account Roles**.

You can also convert existing community accounts with a single community user to the shared person role using the `User` object in the SOAP API. Change the community user's `UserRoleId` to the ID of the shared person role.

Create Multilingual Communities in Community Builder

You no longer have to go to Site.com Studio to create multilingual communities. Language controls are available in Community Builder settings.

To add languages, set the default community language, export content, and import translated content, click  > **Languages**.



After you add one or more languages, the language selector  appears on the main toolbar so you can switch between languages.

Improve SEO for Your Community Pages

Dynamically include Salesforce object information and additional metadata to help customers and search engines find the information and answers they're looking for quickly. This feature is available for use in Lightning communities and Lightning Bolt solutions.

SEE ALSO:

[Salesforce Help: Set Up SEO for Your Community](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Update Your Community's Template](#) (can be outdated or unavailable during release preview)

Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files (Critical Update)

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SEE ALSO:

[Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

Chatter in Lightning Communities: Rich Content Editor on Mobile, Notifications for Group Mentions, and Share Via Link

Add style to your mobile feeds. Get in-app notifications when your group is mentioned. Share links to posts. And harness your unique expertise when the questions you're most qualified to answer are delivered right to you.

IN THIS SECTION:

[Add Style to Your Community Posts on the Go \(Pilot\)](#)

Be prepared for awesome when you post to a community feed on the go. The rich content editor is now available when you post or comment, ask or answer. Edit posts you added from your desktop. Add style, emphasis, and lists with ease.

[Add Hashtags to Polls](#)

Easily find all related posts under one topic whenever you want by using hashtags when you publish polls. For example, tag all your HR-related polls with #FabPlaceToWork or #Awesome! Use this new feature in Lightning Experience and Lightning communities.

[Get In-App Notifications for Group Mentions](#)

Group members have a new opportunity to be more responsive when their group is @mentioned. Group mentions now trigger in-app notifications. Discover quickly what people want the group to be aware of.

[Share Links to Posts with Your Community](#)

The Share feature in the Chatter publisher now includes a Copy Link option. Use it to copy a link to the detail view of a post.

[Get the Top-Five Questions You're Most Qualified to Answer \(Pilot\)](#)

Now you have the best chance to respond quickly to the questions you're most qualified to answer. Community questions are matched to your expertise, and the highest-ranking five are delivered to the top of your view of the Unanswered Questions component.

[Likes and Upvotes Are Counted Together](#)

Chances are that when you decide to use upvotes instead of likes, your feeds already have lots of likes on questions and answers. You don't want to lose those likes, and you don't have to. When you change to upvotes, likes are converted to upvotes and included in the upvote count.

[Jump to Your Community from Email Notifications](#)

Until now, when a community member received a new-user or password reset notification, the email didn't lead back to the user's community. We've taken care of it—a link takes users to their default community.

[Do More in Community Streams from Your Internal Salesforce Org \(Beta\)](#)

Working links and topics, upvote and downvote, and mark as company verified—these actions are now available when you view a community stream from your internal Salesforce org.

[Get More Streamlined Updates in the Last Activity Group List](#)

When you look at the Last Activity column in a group list, you see the date and time of the last update. But what if you have a super popular group with people posting updates in continuation? To help with lag time and performance, the timestamp in the Last Activity column now shows updates that have been made up to 5 minutes before. For instance, if you post something at 8:25, 8:26, and 8:27, the timestamp shows 8:25 until there's a post at 8:30. This change applies to group activities in Salesforce Classic, Lightning Experience, and Lightning communities.

Add Style to Your Community Posts on the Go (Pilot)

Be prepared for awesome when you post to a community feed on the go. The rich content editor is now available when you post or comment, ask or answer. Edit posts you added from your desktop. Add style, emphasis, and lists with ease.

Contact Salesforce Support to enable this pilot feature.



 **Note:** We provide the mobile rich content editor to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

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Easily find all related posts under one topic whenever you want by using hashtags when you publish polls. For example, tag all your HR-related polls with #FabPlaceToWork or #Awesome! Use this new feature in Lightning Experience and Lightning communities.

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Group members have a new opportunity to be more responsive when their group is @mentioned. Group mentions now trigger in-app notifications. Discover quickly what people want the group to be aware of.

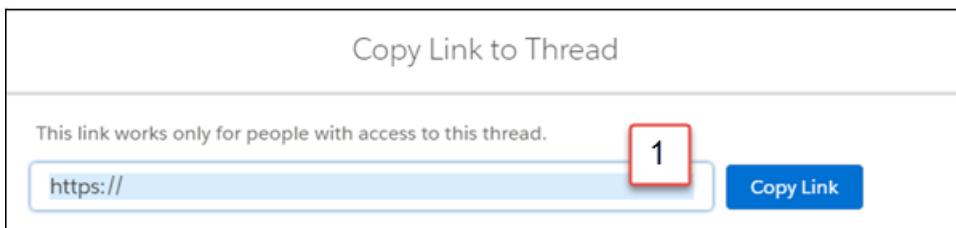
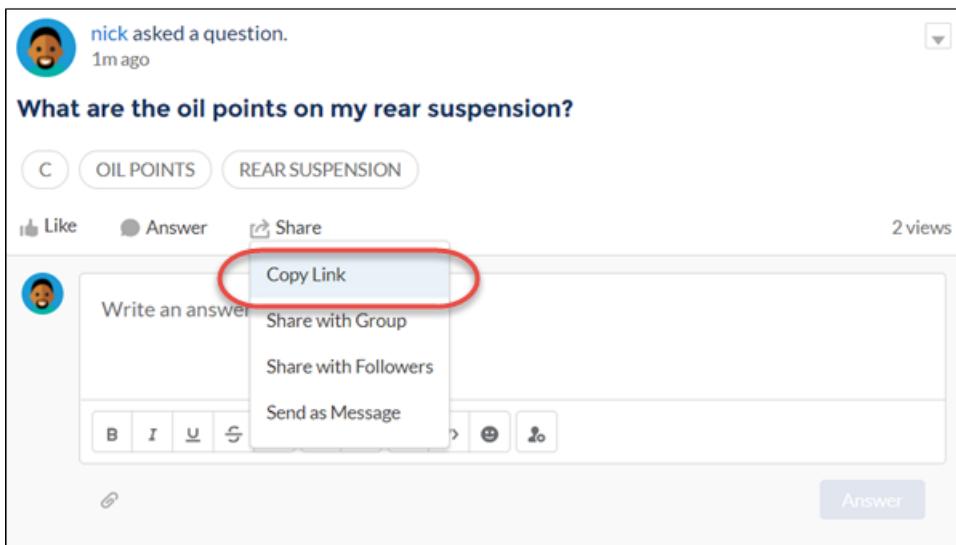
To be notified about group mentions, members must select **Email on every post** under Groups in their email notifications settings.

SEE ALSO:

[Salesforce Help: Update Your Email Notifications in Chatter](#) (can be outdated or unavailable during release preview)

Share Links to Posts with Your Community

The Share feature in the Chatter publisher now includes a Copy Link option. Use it to copy a link to the detail view of a post.



The full link appears in the Copy Link to Thread dialog (1). We took it out of this image to preserve privacy.

Copying places the link on your clipboard. You can paste the link wherever you like. Paste it in the Chatter publisher to see a preview of the post you're linking to.

Get the Top-Five Questions You're Most Qualified to Answer (Pilot)

Now you have the best chance to respond quickly to the questions you're most qualified to answer. Community questions are matched to your expertise, and the highest-ranking five are delivered to the top of your view of the Unanswered Questions component.

How do we rank questions? First, we gauge which questions have the most views. Then we rank those questions by their topics and your demonstrated knowledge of those topics. Finally, we send the top-five questions that would benefit from your expertise to the top of your view of the Unanswered Questions component.

When there are no ranked questions to send your way, the component lists the questions with the most views first.



Note: We provide the top-five unanswered questions to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

[Chatter REST API](#) and [Chatter in Apex](#) support top-five unanswered questions.

Likes and Upvotes Are Counted Together

Chances are that when you decide to use upvotes instead of likes, your feeds already have lots of likes on questions and answers. You don't want to lose those likes, and you don't have to. When you change to upvotes, likes are converted to upvotes and included in the upvote count.

Click the count to see a list of the people who have upvoted.



Note: No one is listed more than once, even if a person both liked and upvoted a question or answer. But each like and upvote is counted. For example, if someone both liked and upvoted a question, the count is 2, although the person's name is listed only once.

[Chatter REST API](#) and [Chatter in Apex](#) support providing a list of people who have upvoted.

If you prefer not to merge like and upvote counts, contact Salesforce support.

SEE ALSO:

[Salesforce Help: Enable Upvoting and Downvoting](#) (can be outdated or unavailable during release preview)

Jump to Your Community from Email Notifications

Until now, when a community member received a new-user or password reset notification, the email didn't lead back to the user's community. We've taken care of it—a link takes users to their default community.



Note: Assign a Default Community in Setup through Profiles.

SEE ALSO:

[Salesforce Help: Assign a Default Community to a User Profile](#) (can be outdated or unavailable during release preview)

Do More in Community Streams from Your Internal Salesforce Org (Beta)

Working links and topics, upvote and downvote, and mark as company verified—these actions are now available when you view a community stream from your internal Salesforce org.



Note: This release contains a beta version of linking in cross-community streams, which means it's a high-quality feature with known limitations. Linking in cross-community streams isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for linking in cross-community streams in the [Cross Community Chatter \(Pilot\) Trailblazer Community](#).

Besides normal feed actions, such as answer, comment, mention, and like, here are actions you can take from the community streams that you visit in your internal Salesforce org.

- Upvote and downvote questions and answers, and see the impact in your community.

- Verify answers, and see the verification in your community.
- Click a link to a user profile, account, topic, or case, and jump to its home community.
- Add a topic, and it's added to your community.
- Click the timestamp on a post, and jump to the post detail view in its home community.
- Copy a link that leads to the item, person, or post detail view in its home community.
- Click a mention in a community stream, and go to its home community.

There's no special setup to get links working between your community and your internal org. However, features, such as upvote and downvote and mark as company verified, do require that you enable them for your community.

Beta Considerations

- You can't create a community stream from your internal Salesforce org. Create streams from your community.
- Some Chatter features that are available in a community aren't available when you visit a community stream from your internal org. For example, file attachments, inline images, post sharing, and hover cards aren't available when you view a community streams internally.
- Community topics don't appear when you view a stream from your internal Salesforce org. However, you can add topics.

SEE ALSO:

[Salesforce Help: Enable Upvoting and Downvoting](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Assign Permission to Verify Answers for Your Company](#) (can be outdated or unavailable during release preview)

Get More Streamlined Updates in the Last Activity Group List

When you look at the Last Activity column in a group list, you see the date and time of the last update. But what if you have a super popular group with people posting updates in continuation? To help with lag time and performance, the timestamp in the Last Activity column now shows updates that have been made up to 5 minutes before. For instance, if you post something at 8:25, 8:26, and 8:27, the timestamp shows 8:25 until there's a post at 8:30. This change applies to group activities in Salesforce Classic, Lightning Experience, and Lightning communities.

Partner Communities: Calendars, Scorecards, Campaign Marketplace, and More Guided Setups

Campaign Marketplace provides channel marketers with a place to share preapproved marketing campaigns with partners so that they can drive demand for their supplier's products or services. Partner scorecards help channel account managers track their account performance against a set of KPIs. Partners and vendors can use calendars to track and share events. And new guided setups make it easy for your admins to set up channel programs and scorecards, Campaign Marketplace, and Intelligent Sales Enablement.

IN THIS SECTION:

[Hold Private Conversations in Your Partner Communities](#)

Partner community members can now have conversations using direct messages. Direct messages offer privacy for more sensitive conversations.

[Track Partner Performance with the Partner Scorecard \(Generally Available\)](#)

Partner scorecards give your channel account managers (CAM) a way to measure an individual's performance and establish benchmarks for their channel programs. You can customize scorecards to display the report summary results that your CAM or executive team wants to see. Use categories to group scorecard metrics into different KPIs. Partner scorecards are available in Lightning communities and Lightning Bolt solutions.

[Create and Personalize Partner Campaigns with Distributed Marketing](#)

Pre-build consumer journeys with Marketing Cloud and deploy them to your partner networks; including franchise owners, financial advisors, and insurance agents. Partners using Sales Cloud, Service Cloud, or Community Cloud can then easily manage and personalize these consumer journeys.

[Boost Channel Marketing ROI with Campaign Marketplace](#)

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully drive demand for products or services. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. Partners can then choose which campaigns work best for them. This feature is available in Lightning communities and Lightning Bolt solutions.

Hold Private Conversations in Your Partner Communities

Partner community members can now have conversations using direct messages. Direct messages offer privacy for more sensitive conversations.

You can start a direct message conversation in lots of places.

- Messages page
- User profiles and hovers on users
- Message Notification and New Message Button components on community pages
- Share option on a feed post

Community members can access their direct messages from **My Messages** on their profile menu.

If it becomes necessary, people can flag direct messages for moderation.

SEE ALSO:

[Salesforce Help: Enable Direct Messages in Your Community \(can be outdated or unavailable during release preview\)](#)

Track Partner Performance with the Partner Scorecard (Generally Available)

Partner scorecards give your channel account managers (CAM) a way to measure an individual's performance and establish benchmarks for their channel programs. You can customize scorecards to display the report summary results that your CAM or executive team wants to see. Use categories to group scorecard metrics into different KPIs. Partner scorecards are available in Lightning communities and Lightning Bolt solutions.

Are you running a channel program in several countries with multiple levels? No problem. You can define and assign scorecards by channel program and level. Do you want to tie scorecard metrics to one particular account? No problem, you can also associate scorecards with several accounts. Add "View scorecard" to your partner template to display the scorecard directly on the account. Each scorecard displays admin-defined metrics that monitor partner performance.

You can organize metrics into different categories, such as sales, marketing, and support. When you select the category you want each metric to belong to, the metrics sort into different tabs on your scorecard. Scorecards are built on top of Salesforce reports, and you can even add scorecards as a tab.

The screenshot shows a 'View Partner Scorecard' window. At the top, there's a dropdown labeled 'Select Scorecard' with 'Scorecard' selected. Below it, there are three tabs: 'SALES' (which is underlined), 'SUPPORT', and 'MARKETING'. The main area displays the following metrics:

	Number of Opportunities	4	Number of Leads	4
Number of Cases	1	Total Sales	\$4,800,000.00	
	\$12,000,000.00	Amount:	\$1,200,000.00	

 **Note:** Metrics are pulled from summary reports. Report data must be filtered against the account in order for it to display correctly. You must have access to the reports you want to associate with scorecards.

Create and Personalize Partner Campaigns with Distributed Marketing

Pre-build consumer journeys with Marketing Cloud and deploy them to your partner networks; including franchise owners, financial advisors, and insurance agents. Partners using Sales Cloud, Service Cloud, or Community Cloud can then easily manage and personalize these consumer journeys.

Let's say you have multiple insurance brokers who are helping launch a new annuity insurance program. You want the messaging about the product to be the same for all customers. You also want the brokers to have some control over how messages are sent. With Distributed Marketing, you can offer a preconfigured campaign, connected to a journey, to the brokers who are marketing the new program. Brokers can add leads or contacts as members and let Marketing Cloud send marketing messages on their behalf. They also have the option of personalizing individual messages before Marketing Cloud sends them out.

The screenshot shows the 'Message Defaults' editor. At the top, there's a note: 'Seeing generic content in your preview? We replace that content with real data when you approve, personalize, and send the message.' Below this, there are tabs: 'EDIT' (which is underlined), 'SEND SETTINGS', and 'MORE'. The 'Selected Message' section contains a message box with 'Welcome to Cumulus!' and a preview icon. The 'Message Defaults' section has two parts: 'Introduction' and 'Conclusion', each with a rich text editor and a 'Do Not Display' checkbox. To the right, there's a preview window showing a landing page for 'Cumulus' with the headline 'INVEST IN YOUR FUTURE today' and a photo of an elderly couple smiling.

Boost Channel Marketing ROI with Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully drive demand for products or services. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. Partners can then choose which campaigns work best for them. This feature is available in Lightning communities and Lightning Bolt solutions.

The channel marketer can easily control which campaigns are visible in the tile view.

Category	Title	Description
EMAIL	Pacifica Enterprise Solutions Product Launch	Announce the latest Pacifica Enterprise solutions to your enterprise customers. This email campaign invites customers to tune into live product announcements taking place on November 5th.
OTHER	Gate Industry Content	Share proprietary articles, reports, and other content on your company blog or social networks. Gate this content with a signup form to generate leads.
SEMINAR / CONFERENCE	West Coast Solutions Summit	Invite prospects to join you at the Pacifica Solutions Summit in San Jose, California, taking place on March 13, 2018.
OTHER	Social Media Brand Awareness	Build brand awareness on social networks like Twitter, LinkedIn, and more.
ADVERTISEMENT	Product Guide Mailer	Send out your products guides to target companies. Market development funds and Co-op funds are available to help cover printing and mailing costs and product guide templates are provided to get you started.
SEMINAR / CONFERENCE	Southwest InfoTech 2018	Host a booth and meet potential customers at Southwest InfoTech 2018 in San Antonio, Texas. Market development funds are available to help cover travel and material costs.

Setting up the campaign marketplace is a breeze. Create a list view, and add filters to create different categories, such as Recommended and High ROI. Create multiple categories, and display them as tabs to make it easier for partners to search for the campaigns they need. You can also add a custom image to your campaign with the new campaign image field.

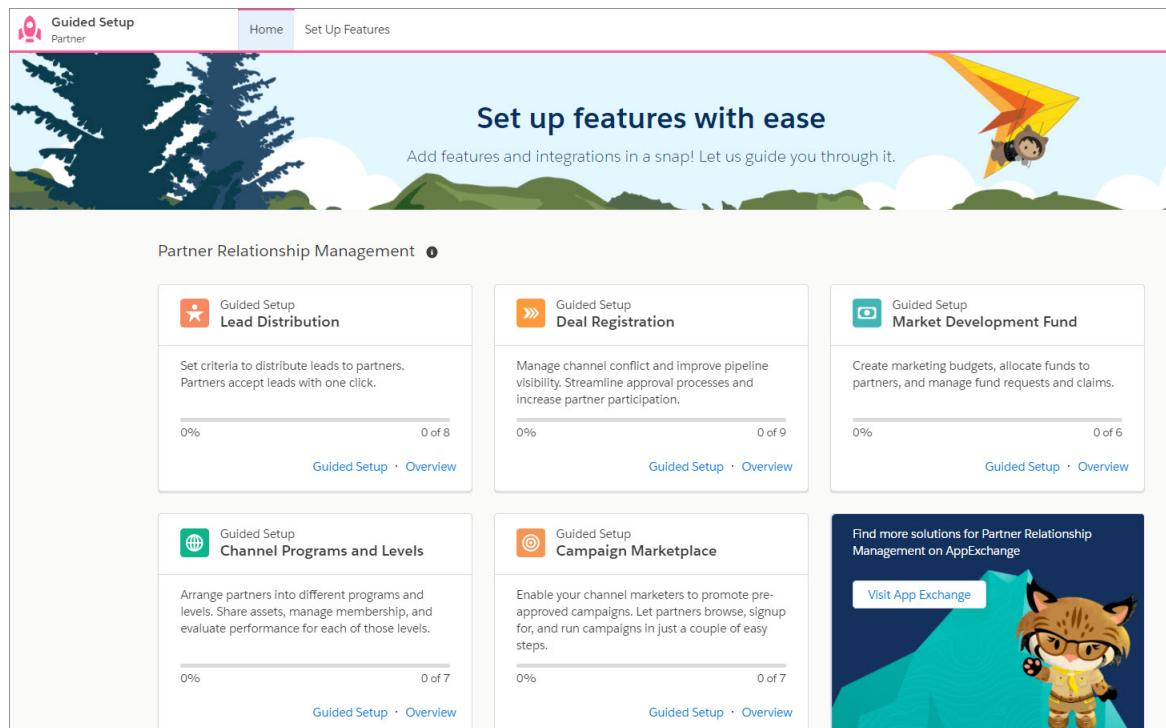
When customers click **Sign Up** on a campaign they want to run, a child campaign record is created from the original campaign. Partners can access all assets associated with the campaigns and customize the campaigns to fit their brand.



Note: You must have a Partner Community license or use Distributed Marketing to use Campaign Marketplace.

New Guided Setups: Channel Programs, Campaign Marketplace, and Intelligent Sales Enablement

New guided setups take your channel programs even further. We walk you through setting up channel programs and scorecards, creating a campaign marketplace, and setting up files and libraries for Intelligent Sales Enablement. You can also access a curated list of community app extensions to find even more solutions for your partner community. You need a Partner license to access Guided Setup from Community Workspaces.



IN THIS SECTION:

[Empower Channel Marketers by Sharing Preapproved Campaigns with Partners](#)

The guided setup for Campaign Marketplace helps you configure the campaign component in your community. You can organize your campaign hierarchy for tracking purposes and create list views to provide partner users with different campaign views. After you set up the campaign marketplace, partner users can create child campaigns by signing up. Channel marketers can add new campaigns and create filters to display campaigns by category, for example, Recommended, High ROI, or Active.

[Manage Channel Membership and Measure Partner Performance](#)

Easily manage channel sales organizations and share resources with different teams. Configure a partner scorecard and associate it with a program, level, or account to track partner performance. After you set up channel programs and scorecards, channel account managers can manage program membership, share resources, and track performance against KPIs.

[Empower Your Sales Teams with Intelligent Sales Enablement](#)

Easily set up libraries, add content and members, and create public links to share files and documents. This feature is new in Lightning Experience.

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Go to **Community Workspaces > Guided Setup**, and find Campaign Marketplace. Click **Guided Setup**, and you're on your way.



Note: You must have a Partner Community license or use Distributed Marketing to use Campaign Marketplace.

SEE ALSO:

[Salesforce Help:Configure Features with Guided Setup \(can be outdated or unavailable during release preview\)](#)

Manage Channel Membership and Measure Partner Performance

Easily manage channel sales organizations and share resources with different teams. Configure a partner scorecard and associate it with a program, level, or account to track partner performance. After you set up channel programs and scorecards, channel account managers can manage program membership, share resources, and track performance against KPIs.

Go to **Community Workspaces > Guided Setup**, and select **Channel Programs and Levels**. Click **Guided Setup**, and you're on your way.



Note: You must have the Manage Scorecards permission and a valid partner account to create partner scorecards.

SEE ALSO:

[Salesforce Help:Configure Features with Guided Setup \(can be outdated or unavailable during release preview\)](#)

Empower Your Sales Teams with Intelligent Sales Enablement

Easily set up libraries, add content and members, and create public links to share files and documents. This feature is new in Lightning Experience.

Go to **Community Workspaces > Guided Setup**, and select **Intelligent Sales Enablement**. Click **Guided Setup**, and you're on your way.

Community Analytics: Case Deflection and Sentiment Analysis Dashboards

Two new dashboards show how well your community is deflecting cases and give you a feel for your community's overall sentiment. The dashboards are available in the Spring '18 Community Management Package on the AppExchange, available soon after the release.

IN THIS SECTION:

[Know How Well Your Community Deflects Cases](#)

Get insight into how well the Contact Support Form and Case Deflection components actually deflect cases from being created.

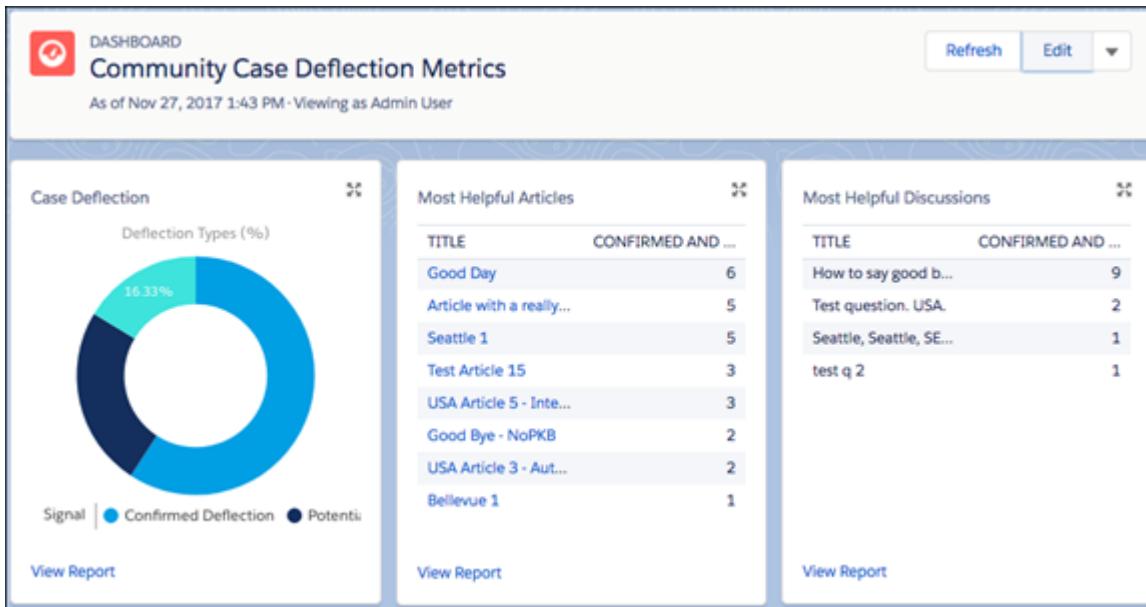
Using the Case Deflection Dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.

[Feel Your Community's Vibe with the Sentiment Analysis Dashboard \(Pilot\)](#)

Sentiment Analysis gives feed posts and comments a positive, neutral, or negative sentiment probability score. The score can help you get a feel for what's going on in your community. We made that information even more useful with a new dashboard.

Know How Well Your Community Deflects Cases

Get insight into how well the Contact Support Form and Case Deflection components actually deflect cases from being created. Using the Case Deflection Dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.



The Case Deflection Dashboard comes with nine prepopulated reports, which tell you if a discussion or article has helped to deflect a case. The dashboard measures three types of deflection: confirmed, potential, and unsuccessful.

Let's say a customer creates a case and uses the deflection component to view a proposed article or discussion. After confirming that the article or discussion was helpful in solving the issue, the customer then abandons the half-completed case. We consider that a deflected case.

A potential deflection happens when an article and discussion might have had a part in deflecting the case.

An unsuccessful deflection happens when a customer looks an article or discussion proposed by the component, but decides to file a case anyway.

Use this dashboard when using the Contact Support Form and Case Deflection components in Lightning communities and Lightning Bolt Solutions. The dashboard is available in the Spring '18 Community Management Package on the AppExchange, available soon after the release.

Feel Your Community's Vibe with the Sentiment Analysis Dashboard (Pilot)

Sentiment Analysis gives feed posts and comments a positive, neutral, or negative sentiment probability score. The score can help you get a feel for what's going on in your community. We made that information even more useful with a new dashboard.

Note: During the pilot of this feature, not all Sentiment Analysis functionality is available. For this release, Sentiment Analysis offers a reporting dashboard.

Important: We provide Sentiment Analysis to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, so we can't guarantee acceptance. Sentiment Analysis isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions based on generally available products and features.

Files in Lightning Communities: Navigate Libraries with Tiles, Allow Standard Users to Create Assets, and Collaborate with Quip

Updates and new features in Files in Lightning Communities make it easier to work with files and libraries. The new tile-based Libraries and Files Experience makes it easier to navigate your libraries and get to the files and folders you need. Quickly access your most recent asset files, allow standard users to create assets, and provide customers with a way to create asset files that unauthenticated users can access. Give your team a way to preview files on the go, use integrated search to fine. Quip integration opens up a whole new world of collaboration.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Navigate Libraries with the Libraries Component \(Generally Available\)](#)

Your libraries are invaluable, so why not make them more dazzling. Now your users can see their files displayed in a grid when you use the tile view in the Libraries component. Drill down inside libraries and folders, and your files display as thumbnails, making it easy to spot that colorful spreadsheet or perfect photo. This feature is available in Lightning communities.

[Allow Standard Users to Create Assets](#)

Any user who has access to Files can now create content assets as long as the user has the View Setup and Configuration user permission. This feature is available in all community templates.

[Collaborate with Community Members with Quip](#)

Quip allows you to create, share, and collaborate on documents and spreadsheets within communities. After you set up Quip in your org, you can use the Quip component on community record pages to give community members access to records. Use integrated search to find Quip files and link to Salesforce records. You can create Quip documents and link them to records and groups.

[Preview Files on the Go](#)

Whether you're working on the go or in the office, you can use File Preview to get to your files. File Preview on Mobile gives you access to your files from your mobile phone or tablet. With options to view and download, you can have a seamless experience while you work from the office or from the road. This feature is new in Lightning Experience.

[Create Asset Files for Unauthenticated Users](#)

Provide customers with a way to create asset files that unauthenticated users can access. This feature comes with a dedicated servlet for unauthenticated users to access the asset file. Make sure that you tag assets as publicly accessible. This feature is available in all community templates.

[Upload Files with the File Upload Component and Cloud Flow Designer](#)

You can now attach files from flows when you use the File Upload Component. You can also create screens in the Cloud Flow Designer. This change applies to Lightning Experience and Salesforce mobile web.

[Skip Triggers and Validation Rules on Asset Files](#)

To help avoid package deployment failure, you can prevent triggers and validation rules from executing on inserts, updates, or deletes related to asset files. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Delete Stored Credentials for Connected Sources](#)

Connecting sources and working smoothly across apps makes life easy. For times when you want to disconnect, you can delete stored credentials or OAuth tokens for connected sources such as GDrive and SharePoint.

Navigate Libraries with the Libraries Component (Generally Available)

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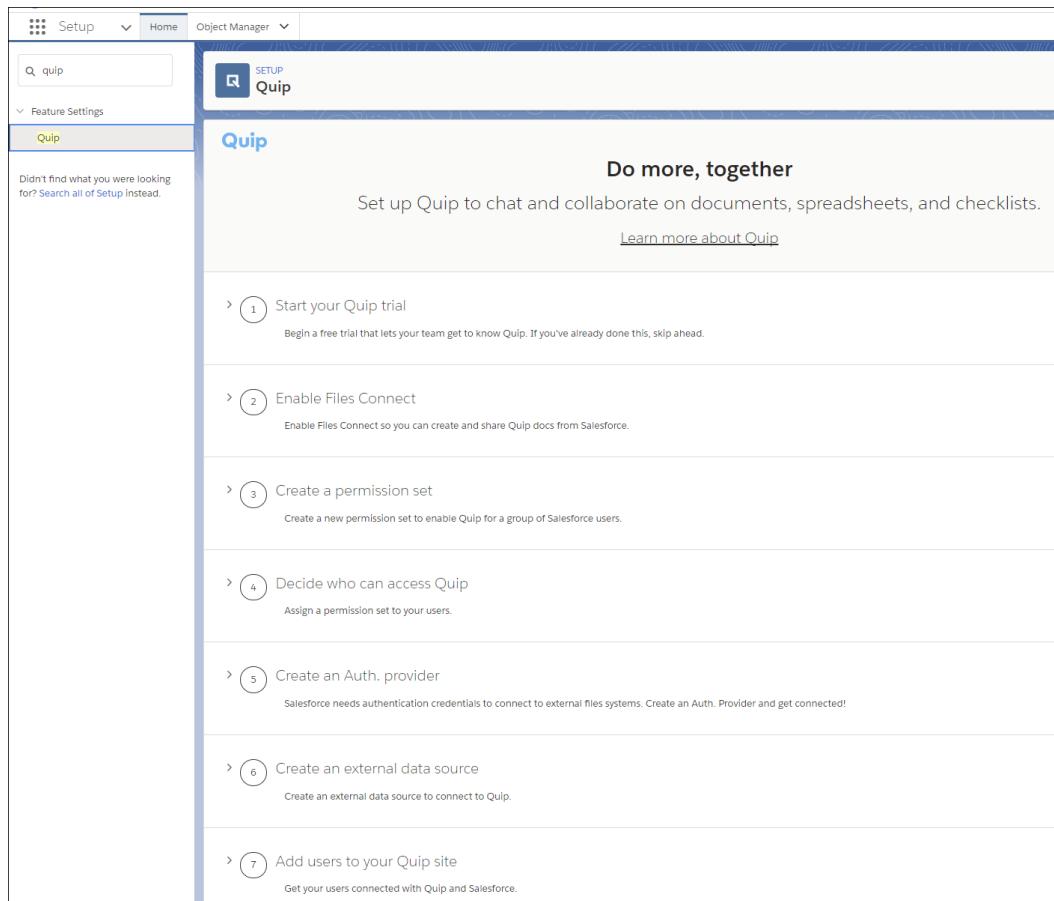
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Use the guided setup to connect your Salesforce org to Quip. Go to **Setup**, enter *Quip* in the Quick Find box, and follow the steps.



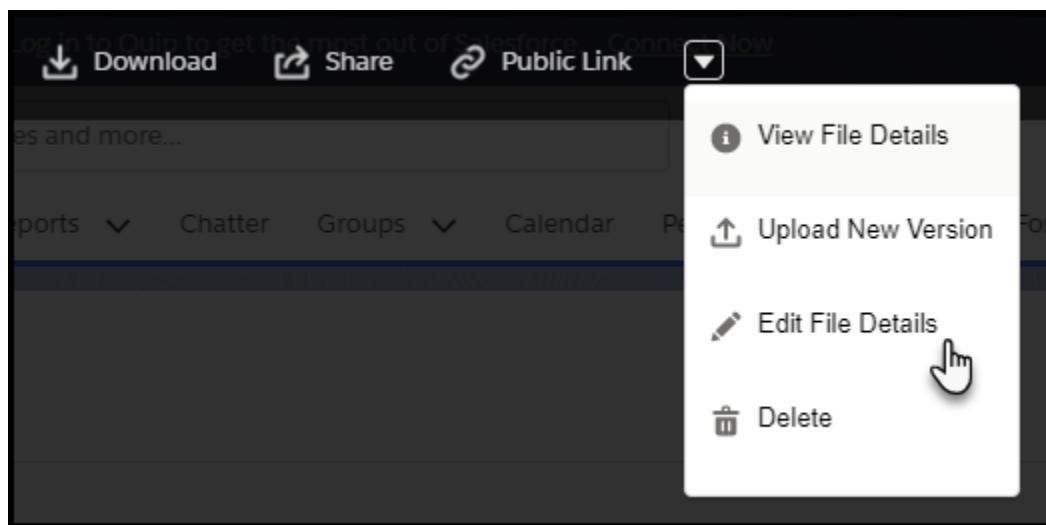
SEE ALSO:

- [Set Up Quip for Better Integration with Salesforce](#)
- [Fine-Tune Account and File Search Results with Filters](#)
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On a desktop, File Preview icons are front and center.



You can also download or view external files in Box, Google Drive, and Quip from Salesforce mobile web. Make sure that the app is installed on your device, you're logged in to the external data source and the external app, and you have access to the file. And don't worry—if you're previewing a Microsoft SharePoint or OneDrive For Business file in Salesforce mobile web, you can download it.

Create Asset Files for Unauthenticated Users

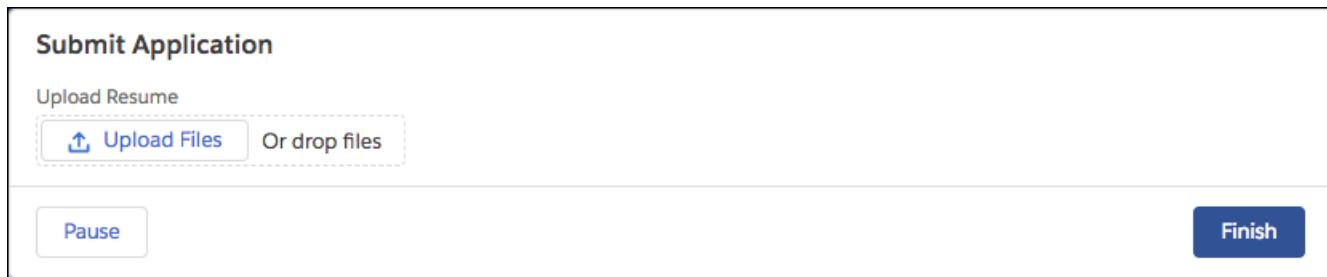
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Upload Files with the File Upload Component and Cloud Flow Designer

You can now attach files from flows when you use the File Upload Component. You can also create screens in the Cloud Flow Designer. This change applies to Lightning Experience and Salesforce mobile web.



SEE ALSO:

[Upload Files Directly from a Flow](#)

Skip Triggers and Validation Rules on Asset Files

To help avoid package deployment failure, you can prevent triggers and validation rules from executing on inserts, updates, or deletes related to asset files. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Go to **Setup**, enter *Files* in the Quick Find box, and select **General Settings**. Then select **Skip triggers execution and validation rules on asset files**.

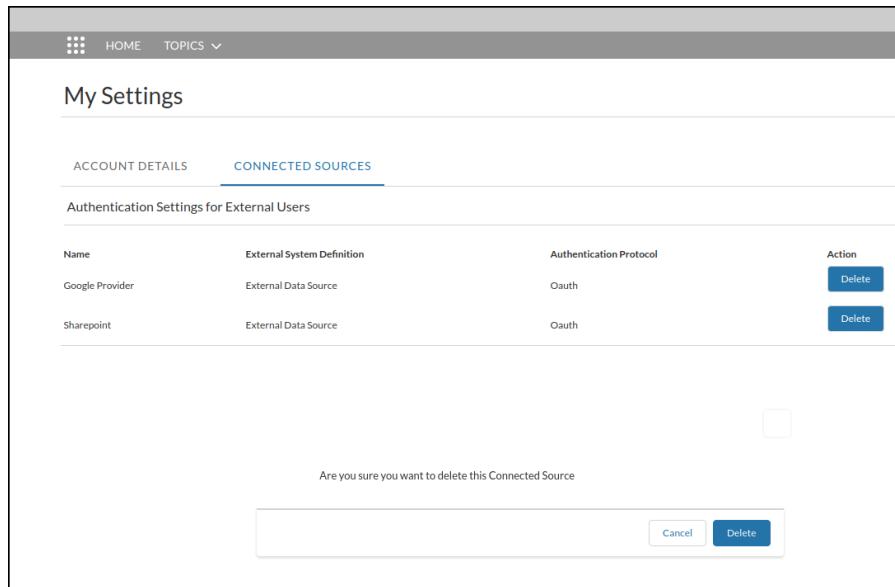
SEE ALSO:

[Skip Triggers and Validation Rules on Asset Files](#)

Delete Stored Credentials for Connected Sources

Connecting sources and working smoothly across apps makes life easy. For times when you want to disconnect, you can delete stored credentials or Oauth tokens for connected sources such as GDrive and SharePoint.

Deleting authorization settings, removes access to external systems from within your Salesforce org. Go to **My Settings**, click **Personal**, and select **Authentication Settings for External Systems**. Delete the connected sources you want to remove.



Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

IN THIS SECTION:

[Automate More Tasks with Process Builder and Workflow Rules](#)

You can now use groups, group memberships, topics, and topic assignments with workflow rules and Process Builder. Send automatic emails to a group owner when a member leaves. Or automagically add a specific topic to a post. This feature is available for use anywhere you use processes and workflow rules.

[Use Custom Mass Actions in the Engagement Queue](#)

Last release we got the ball rolling by adding some mass actions you can use in the Engagement Queue, notably freezing and unfreezing members. Those mass actions are still available by default, but this release we're also bringing you the option of using your own custom actions.

[Data Retention Shortened for Einstein Spam Detection \(Pilot\)](#)

The data retention period for Einstein Spam Detection has been reduced from 365 days to 90 days.

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To make things super clear in Community Builder, we've changed the name of the Member Profile component to Member Profile and Settings.

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For example, you want to keep close tabs on the topic #AwesomeAdmin in your org. You create a process in which you get an email every time someone assigns the topic to a post. That way you are pinged whenever someone is happy with your admin's work.

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SEE ALSO:

[Salesforce Help: Create Custom Actions for Community Insights](#) (can be outdated or unavailable during release preview)

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Chatter: Improved Following, More In-App Notifications, Share Links to Posts

The What I Follow feed is focused on who you actually follow. When people mention one of your groups, you can get an in-app notification. Easily share a link to a post.

IN THIS SECTION:

[Chatter Feeds: Improved Following, In-App Notifications for Group Mentions, Sharing Via Link](#)

We're keeping the What I Follow feed focused on who you actually follow. When people mention one of your groups, you can get an in-app notification. It's easier than ever to share a link to a post.

[Other Changes in Chatter: Streamlined Group Activity, Chatter Tasks in Process Builder and Workflow Rules, Hashtags in More Places](#)

Get streamlined last-activity updates for groups. Find out what you can do when Chatter meets Process Builder and workflow rules. Use hashtags in polls to organize more information in your topics.

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IN THIS SECTION:

[Follow What You Follow](#)

Following someone's posts can be a distracting business. You're interested in one coworker's posts, and suddenly your feed is overrun with posts from everyone else who is, too. In the Winter '16 release, all new Salesforce orgs limited the What I Follow feed to who you actually follow—no more interlopers! Now we're sharing this goodness with older orgs. (We don't enable the updated follow model for orgs that have opted out of auto-enabling.) Post an update to a coworker's profile. Now the only people who see your post are the coworker, the people who follow you, and the people you @mention. This feature is available on all platforms.

[Get In-App Notifications for Group Mentions](#)

Group members have a new opportunity to be more responsive when their group is @mentioned. Group mentions now trigger in-app notifications. Discover quickly what people want the group to be aware of. This feature is available in Lightning Experience and Lightning communities.

[Share Links to Posts](#)

The Share feature in the Chatter publisher now includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. This feature is available in Lightning Experience.

[Apply a Filter and Make It Stick](#)

When you apply a filter to a feed, you want it to persist. You don't want to reset it each time you visit the feed. Group and profile feeds—and almost any other feed where you select a feed filter—now hold on to your filter. The filter for that particular feed stays in place, even when you close your browser or navigate away from the feed. This feature is available in Lightning Experience.

[Do More in Community Streams from Your Internal Salesforce Org \(Beta\)](#)

Working links and topics, upvote and downvote, and mark as company verified—these actions are now available when you view a community stream from your internal Salesforce org. These features are available in Lightning Experience and Lightning communities.

[Work with a Streamlined List of Rich Link Preview Domains](#)

We did some housekeeping on the list of domains we support for rich link previews. We added new domains and cleared out the obsolete ones. Supported domains provide high-quality thumbnails and previews of the files you attach to your Chatter posts. This feature is available in Lightning Experience.

[Get Improved Performance with Optimized Chatter User Email Digests](#)

To improve performance, we reduced both the size of digest emails and the complexity of the nesting levels used in formatting the digest. Although the overall look and feel of digests is the same, you see small changes depending on the email client you use. These changes apply to user digests only. Group digests are unchanged. This feature is available on all platforms.

[@Mention Privacy in Private Groups](#)

We added a notice to clarify who is and isn't seeing a post when you post to a private group and mention other groups. This feature is available in Lightning Experience and communities based on the Customer Service (Napili) template.

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If you opted out of auto-enabling new features in your org, contact Salesforce to get this update.



Note: Let's say, after the updated follow model kicks in, you're still seeing stuff that you wouldn't expect in your What I Follow feed. It's likely because we don't go back in time and delete previously created entries. Leaving a group or unfollowing a person or object prevents notifications about new posts. But comments on old posts can continue to bubble up in your What I Follow feed.

Get In-App Notifications for Group Mentions

Group members have a new opportunity to be more responsive when their group is @mentioned. Group mentions now trigger in-app notifications. Discover quickly what people want the group to be aware of. This feature is available in Lightning Experience and Lightning communities.

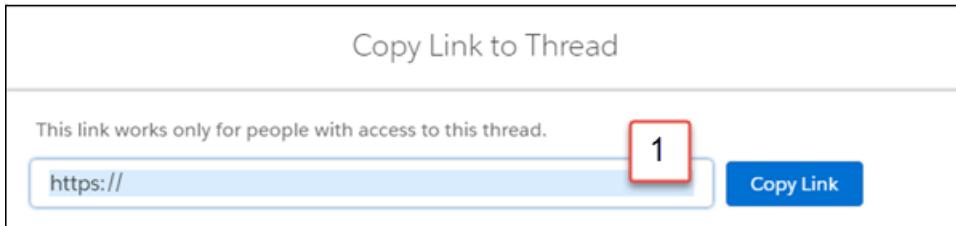
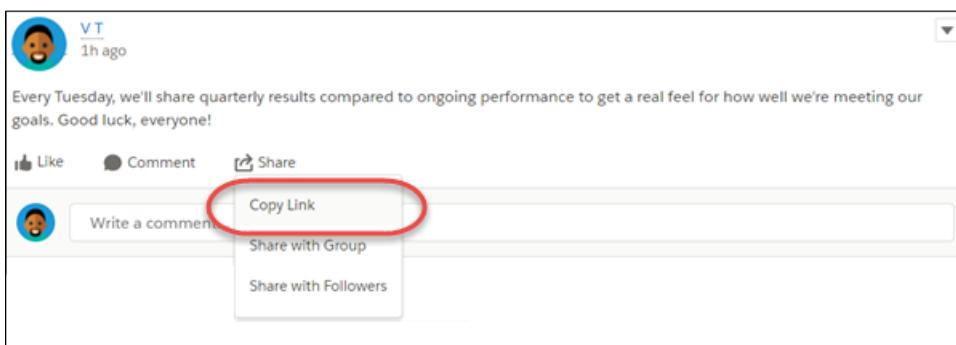
To be notified about group mentions, members must select **Email on every post** under Groups in their Chatter email notifications settings.

SEE ALSO:

[Salesforce Help: Update Your Email Notifications in Chatter \(can be outdated or unavailable during release preview\)](#)

Share Links to Posts

The Share feature in the Chatter publisher now includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. This feature is available in Lightning Experience.

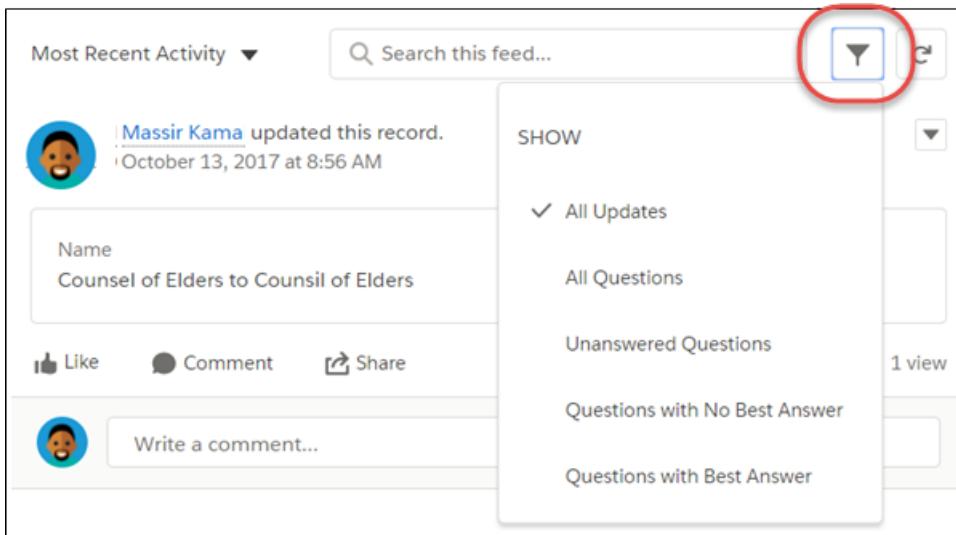


The full link appears in the Copy Link to Thread dialog (1). We took it out of this image to preserve privacy.

Copying places the link on your clipboard. You can paste the link wherever you like. Paste it in the Chatter publisher to see a preview of the post you're linking to.

Apply a Filter and Make It Stick

When you apply a filter to a feed, you want it to persist. You don't want to reset it each time you visit the feed. Group and profile feeds—and almost any other feed where you select a feed filter—now hold on to your filter. The filter for that particular feed stays in place, even when you close your browser or navigate away from the feed. This feature is available in Lightning Experience.



Stickiness applies only to the feed where you set it, so you can set different filters on different feeds. Clearing your browser cache clears the filter, so the next time you visit the feed, you get the default filter.

Sorting options and filters on the What I Follow feed aren't sticky.

Do More in Community Streams from Your Internal Salesforce Org (Beta)

Working links and topics, upvote and downvote, and mark as company verified—these actions are now available when you view a community stream from your internal Salesforce org. These features are available in Lightning Experience and Lightning communities.

 **Note:** This release contains a beta version of linking in cross-community streams, which means it's a high-quality feature with known limitations. Linking in cross-community streams isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for linking in cross-community streams in the [Cross Community Chatter \(Pilot\) Trailblazer Community](#).

Besides normal feed actions, such as answer, comment, mention, and like, here are actions you can take from the community streams that you visit in your internal Salesforce org.

- Upvote and downvote questions and answers, and see the impact in your community.
- Verify answers, and see the verification in your community.
- Click a link to a user profile, account, topic, or case, and jump to its home community.
- Add a topic, and it's added to your community.
- Click the timestamp on a post, and jump to the post detail view in its home community.
- Copy a link that leads to the item, person, or post detail view in its home community.
- Click a mention in a community stream, and go to its home community.

There's no special setup to get links working between your community and your internal org. However, features, such as upvote and downvote and mark as company verified, do require that you enable them for your community.

Beta Considerations

- You can't create a community stream from your internal Salesforce org. Create streams from your community.

- Some Chatter features that are available in a community aren't available when you visit a community stream from your internal org. For example, file attachments, inline images, post sharing, and hover cards aren't available when you view community streams internally.
- Community topics don't appear when you view a stream from your internal Salesforce org. However, you can add topics.

SEE ALSO:

[Salesforce Help: Enable Upvoting and Downvoting](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Assign Permission to Verify Answers for Your Company](#) (can be outdated or unavailable during release preview)

Work with a Streamlined List of Rich Link Preview Domains

We did some housekeeping on the list of domains we support for rich link previews. We added new domains and cleared out the obsolete ones. Supported domains provide high-quality thumbnails and previews of the files you attach to your Chatter posts. This feature is available in Lightning Experience.

For a list of supported domains, see "[URL Domains for Rich Link Previews in Feeds](#)."

Get Improved Performance with Optimized Chatter User Email Digests

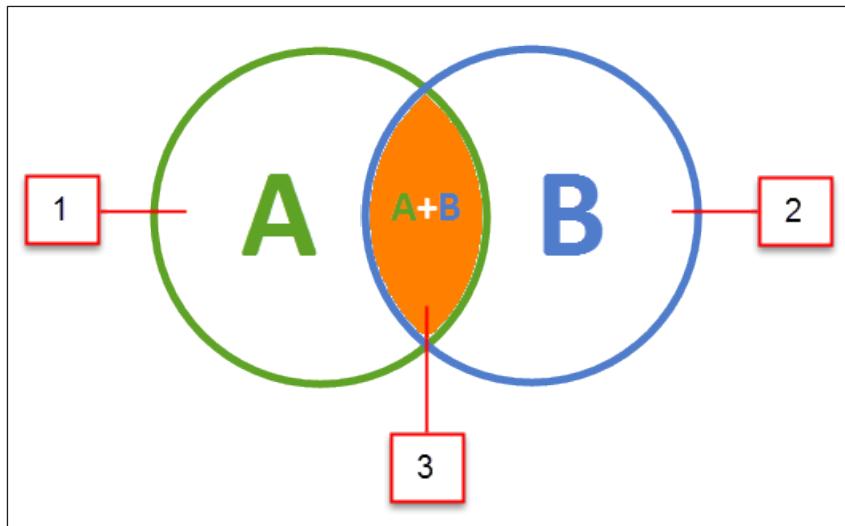
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@Mention Privacy in Private Groups

We added a notice to clarify who is and isn't seeing a post when you post to a private group and mention other groups. This feature is available in Lightning Experience and communities based on the Customer Service (Napili) template.

The notice appears above the post. It points out that people must be members of both the mentioned and private groups to see the post in the mentioned group.

The screenshot shows the Chatter Post interface. At the top, there are tabs for 'Post', 'Poll', and 'Question'. Below the tabs, the 'To' field is set to 'Front Office'. A red oval highlights a message: 'This post is visible to any members of JOPA, Department Heads, and Front Office & DHs who are also members of this group.' Below this, it says 'Operations Officer doesn't have access to this group and won't see this update.' The main post area contains text: 'Testing the new at-mention notification for mentioning other groups in a private group (@[Front Office] in this case). Hey, @[JOPA] and DHs @[Department Heads] will you be able to see this? JOPA and Department Heads are other public groups. Let's add another group and an individual user too... Hey @[Front Office & DHs] what's up? What about @[Operations Officer]... can she see this?' At the bottom, there are rich text editing tools, a note about linking to records, and buttons for 'Save Draft' and 'Share'.



Let's say you post to private group A (1), and mention group B (2) on that post. Only those people who are members of both groups A and B see the post in group B (3).

Other Changes in Chatter: Streamlined Group Activity, Chatter Tasks in Process Builder and Workflow Rules, Hashtags in More Places

Get streamlined last-activity updates for groups. Find out what you can do when Chatter meets Process Builder and workflow rules. Use hashtags in polls to organize more information in your topics.

IN THIS SECTION:

[Get More Streamlined Updates in the Last Activity Group List](#)

When you look at the Last Activity column in a group list, you see the date and time of the last update. But what if you have a super popular group with people posting updates in continuation? To help with lag time and performance, the timestamp in the Last Activity column now shows updates that have been made up to 5 minutes before. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Automate Chatter Tasks with Process Builder and Workflow Rules](#)

You can now use groups, group memberships, topics, and topic assignments with workflow rules and Process Builder. Send automatic emails to a group owner when a group member leaves. Or automatically add a specific topic to a post. This feature is available for use anywhere you use processes and workflow rules. This change applies to both Lightning Experience and Salesforce Classic.

[Use Hashtags in Polls](#)

Easily find all related posts under one topic whenever you want by using hashtags when you publish polls. For example, tag all your HR-related polls with #FabPlaceToWork or #Awesome! This change applies to both Lightning Experience and Salesforce Classic.

[Chatter Messenger Is Being Retired in Spring '18](#)

Chatter Messenger is retiring on March 30, 2018. At that time, admins and end users can no longer access the feature and Salesforce will no longer support it.

[Chatter Desktop Is Being Retired in Summer '18](#)

Chatter Desktop is retiring in June 2018. After the feature is retired, users will be unable to access Chatter or receive updates through the desktop client.

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[Get More Streamlined Updates in the Last Activity Group List](#)

Automate Chatter Tasks with Process Builder and Workflow Rules

You can now use groups, group memberships, topics, and topic assignments with workflow rules and Process Builder. Send automatic emails to a group owner when a group member leaves. Or automagically add a specific topic to a post. This feature is available for use anywhere you use processes and workflow rules. This change applies to both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Automate More Tasks with Process Builder and Workflow Rules](#)

Use Hashtags in Polls

Easily find all related posts under one topic whenever you want by using hashtags when you publish polls. For example, tag all your HR-related polls with #FabPlaceToWork or #Awesome! This change applies to both Lightning Experience and Salesforce Classic.

Chatter Messenger Is Being Retired in Spring '18

Chatter Messenger is retiring on March 30, 2018. At that time, admins and end users can no longer access the feature and Salesforce will no longer support it.

Chatter Messenger will be disabled for all users and removed from Setup and Chat Settings. You'll be unable to access past chat data or see the Chat Now icon. For more information, see [Chatter Messenger Retirement](#).

Chatter Desktop Is Being Retired in Summer '18

Chatter Desktop is retiring in June 2018. After the feature is retired, users will be unable to access Chatter or receive updates through the desktop client.

After June 30, your current Chatter Desktop feature will be unavailable and Salesforce will no longer support it. You can still access Chatter from your browser. For more information, see [Chatter Desktop Retirement](#).

Files: Managing Library Membership, File Preview on the Go, Using Quip with Salesforce

Give your team a way to preview files on the go. Quickly access your most recent asset files, allow standard users to create assets, and provide customers with a way to create asset files that unauthenticated users can access. Flow is a new way to use the File Upload component. Add library members from the Files Home tab with the new Library Member Management feature. Use the Quip Guided setup to integrate Quip and Salesforce.

Editions

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Access Files with the View List of Assets](#)

With the View List of Asset Files, you can quickly access all your asset files. Files are listed in order by the date last modified. When you click a file's Unique Name, the Details page appears, and you can view the file. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Allow Standard Users to Create Assets](#)

Any user who has access to Files can now create content assets as long as the user has the View Setup and Configuration user permission. Use the latest version of the API to create content assets. This feature is new in both Lightning Experience and Salesforce Classic.

[Create Asset Files for Unauthenticated Users](#)

You now have a way to provide customers with a way to create asset files that unauthenticated users can access. This feature comes with a dedicated servlet for unauthenticated users to access the Asset file. Make sure to tag assets as publicly accessible. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Preview Files on the Go](#)

Whether you're working on the go or in the office, you can use File Preview to get to your files. File Preview on Mobile gives you access to your files from your mobile phone or tablet. With options to view and download, you can have a seamless experience while you work from the office or from the road. This feature is available in Lightning Experience and Salesforce mobile web.

[Add Library Members with Library Member Management \(Beta\)](#)

Library Member Management is a new way to add library members from the Files Home tab. You can add multiple members at the same time and set member permissions, such as Admin, Viewer, or Collaborator. This feature is new in Lightning Experience.

[Set Up Quip for Better Integration with Salesforce](#)

Connect your Salesforce org to Quip with a few simple steps. Quip seamlessly combines your team's work and communication in a central hub. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Integrate Quip](#)

Set up Quip to chat and collaborate on documents, spreadsheets, and checklists. This feature is new in both Lightning Experience and Salesforce Classic.

[Upload Files from a Flow](#)

You can upload files from a flow by adding the forceContent:fileUpload Lightning component to a flow screen. This change applies to Lightning Experience and Salesforce mobile web. However, it only works for the Lightning flow runtime.

[Skip Triggers and Validation Rules on Asset Files](#)

To help avoid package deployment failure, you can prevent triggers and validation rules from executing on inserts, updates, or deletes related to asset files. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Access Files with the View List of Assets

With the View List of Asset Files, you can quickly access all your asset files. Files are listed in order by the date last modified. When you click a file's Unique Name, the Details page appears, and you can view the file. These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

To see your list, go to **Setup**, enter Asset Files in the Quick Find box, and select **Asset Files**.

SEE ALSO:

[Fine-Tune Account and File Search Results with Filters](#)

Allow Standard Users to Create Assets

Any user who has access to Files can now create content assets as long as the user has the View Setup and Configuration user permission. Use the latest version of the API to create content assets. This feature is new in both Lightning Experience and Salesforce Classic.

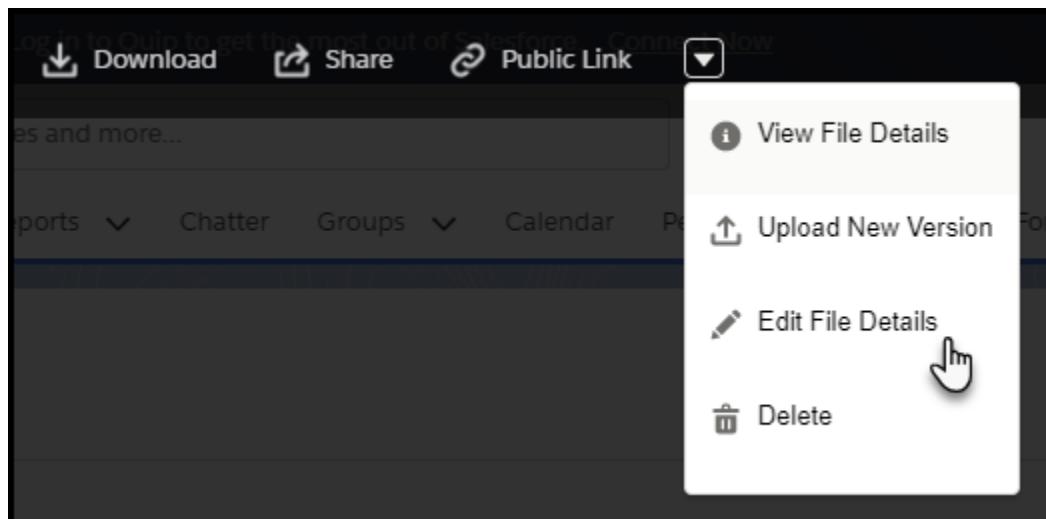
Create Asset Files for Unauthenticated Users

You now have a way to provide customers with a way to create asset files that unauthenticated users can access. This feature comes with a dedicated servlet for unauthenticated users to access the Asset file. Make sure to tag assets as publicly accessible. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Preview Files on the Go

Whether you're working on the go or in the office, you can use File Preview to get to your files. File Preview on Mobile gives you access to your files from your mobile phone or tablet. With options to view and download, you can have a seamless experience while you work from the office or from the road. This feature is available in Lightning Experience and Salesforce mobile web.

On a desktop, File Preview icons are front and center.

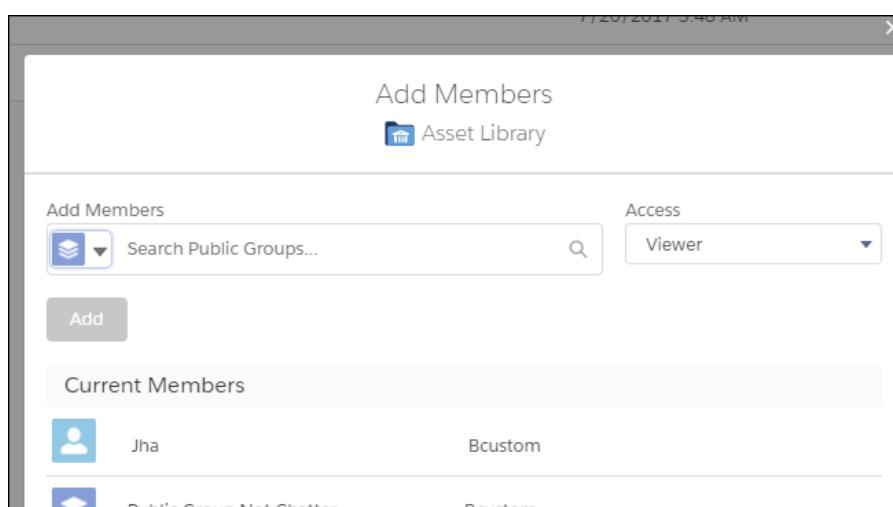


You can also download or view external files in Box, Google Drive, and Quip from Salesforce mobile web. Make sure that the app is installed on your device, you're logged in to the external data source and the external app, and you have access to the file. And don't worry—if you're previewing a Microsoft SharePoint or OneDrive For Business file in Salesforce mobile web, you can download it.

Add Library Members with Library Member Management (Beta)

Library Member Management is a new way to add library members from the Files Home tab. You can add multiple members at the same time and set member permissions, such as Admin, Viewer, or Collaborator. This feature is new in Lightning Experience.

 **Note:** This release contains a beta version of Library Member Management, which means it's a high-quality feature with known limitations. Library Member Management isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.



You can change library member management permissions using Salesforce Classic.

 **Note:** We don't differentiate between internal and external users.

Set Up Quip for Better Integration with Salesforce

Connect your Salesforce org to Quip with a few simple steps. Quip seamlessly combines your team's work and communication in a central hub. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Go to **Setup**, enter *Quip* in the Quick Find box, and follow the steps.

SEE ALSO:

[Salesforce Help: Quip Integration Setup for Salesforce Administrators](#) (can be outdated or unavailable during release preview)

Integrate Quip

Set up Quip to chat and collaborate on documents, spreadsheets, and checklists. This feature is new in both Lightning Experience and Salesforce Classic.

Go to **Community Workspaces > Guided Setup**, and select **Quip Integration**. Click **Guided Setup**, and you're on your way.

Upload Files from a Flow

You can upload files from a flow by adding the forceContent:fileUpload Lightning component to a flow screen. This change applies to Lightning Experience and Salesforce mobile web. However, it only works for the Lightning flow runtime.

SEE ALSO:

[Upload Files Directly from a Flow](#)

Skip Triggers and Validation Rules on Asset Files

To help avoid package deployment failure, you can prevent triggers and validation rules from executing on inserts, updates, or deletes related to asset files. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Go to **Setup**, enter *Files* in the Quick Find box, and select **General Settings**. Then select **Skip triggers execution and validation rules on asset files**.

Salesforce Integrations: Let Users Add WebEx Meetings to Salesforce Events

Salesforce users who also use Cisco WebEx for their meetings can add their personal room or a new meeting to Salesforce events. This change applies to Lightning Experience only.

Users can add a WebEx meeting from the event record page.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The screenshot shows a Salesforce event page for "Meeting with Jason Price". At the top, there are buttons for "New Contact", "New Opportunity", "New Case", and a dropdown. Below that, event details are listed: Location (Location), Start (12/7/2017 11:30 AM), and End (12/7/2017 12:30 PM). A red box highlights a component titled "Cisco WebEx Meeting" with options "Personal Room" and "New Meeting", and a "Save" button. Below this, the "DETAILS" tab is selected, showing "Calendar Details" and fields for "Assigned To" (Phil Smith), "Related To" (Acme -- Palo Alto), "Subject" (Meeting with Jason Price), and "Name" (Jason Price).

To let your users add WebEx meetings to their Salesforce events:

1. Enable WebEx Meetings in Setup. A WebEx site name is required. The WebEx site administrator can provide the site name for your org.
2. Create a permission set for Cisco WebEx users, and assign the permission set to them.
3. The Cisco WebEx Composer component is added to your users' event pages. When you create a custom event page, add the component using the Lightning App Builder.

Users without the WebEx user permission don't see this component on the page.

Mobile: Do More on the Go

Salesforce mobile apps help your users stay productive throughout their busy days, no matter where they are. So we've been hard at work adding new ways to help your users outside of the office. Salesforce offers improvements to Chatter and many other sales features, so sales professionals can take care of even more business from their phones.

IN THIS SECTION:

[Salesforce Mobile App: Better Sales Features and Chatter Enhancements](#)

Salesforce has your team's back. They can now streamline opportunity team creation by adding account team members to the opportunity team. They'll also never miss a beat when they're away from their desks with push notifications for group mentions.

Salesforce Authenticator: Improved Communication and Activity Tracking

Salesforce Authenticator v2.11 now communicates more clearly with you. Stay on top of each verification activity's full history, including the action, date, location, device, and response.

Salesforce Mobile App: Better Sales Features and Chatter Enhancements

Salesforce has your team's back. They can now streamline opportunity team creation by adding account team members to the opportunity team. They'll also never miss a beat when they're away from their desks with push notifications for group mentions.

EDITIONS

Available in: **All** Editions except Database.com

IN THIS SECTION:

[Access the Salesforce Mobile App](#)

Your users have several options for accessing Salesforce on mobile devices that meet minimum platform requirements.

[What's New in Salesforce for Android and iOS](#)

The latest release of the Salesforce for Android and iOS version 15.0. At a glance, here's what's new in the version 15.0 apps.

[Everything That's New in the Salesforce App](#)

Our latest round of new and improved Salesforce app features makes it easier to access Salesforce on the go.

[Spring '18 Features That Are Different or Not Available in the Salesforce App](#)

The Salesforce mobile app doesn't include all the functionality that's available in the full Salesforce site, whether your org is using Lightning Experience or Salesforce Classic. Learn about the Spring '18 Salesforce enhancements that either aren't available in the Salesforce app, have functional gaps from the full site, or work differently in the app.

Access the Salesforce Mobile App

Your users have several options for accessing Salesforce on mobile devices that meet minimum platform requirements.

- Install Salesforce for Android or iOS. Users can download the app from Google Play or the App Store.
- Access Salesforce mobile web from a supported mobile browser on supported Android, iOS, and Windows devices. This option doesn't require anything to be installed.

What's New in Salesforce for Android and iOS

The latest release of the Salesforce for Android and iOS version 15.0. At a glance, here's what's new in the version 15.0 apps.

Salesforce for Android, Version 15.0

Salesforce for Android, version 15.0 will be released to Google Play the week of February 12, 2018 and gradually rolled out to customers over a couple of weeks.

Here's what's new in Salesforce for Android.

- [Enjoy a Modern Chatter Experience in Salesforce for Android](#) on page 341
- [Share Content with the New Chatter Post Composer](#) on page 340
- [View Inline Images and Multiple Attachments in the Chatter Feed](#) on page 343
- [Access Your Custom Feeds with Chatter Streams](#) on page 345
- [Access and Collaborate in the Quip App](#) on page 337
- [Create Shortcuts to Your Top Salesforce Pages with Favorites](#) on page 346

Salesforce for iOS, Version 15.0

Beginning the week of February 12, 2018, the App Store starts serving up Salesforce for iOS, version 15.0.

Here's what's new in Salesforce for iOS.

- [Animate Your Messages with Third-Party Keyboards](#) on page 348
- [Run Salesforce on Your iPhone X](#) on page 335
- [Access Your Custom Feeds with Chatter Streams](#) on page 345
- [Access and Collaborate in the Quip App](#) on page 337
- [Create Shortcuts to Your Top Salesforce Pages with Favorites](#) on page 346

Everything That's New in the Salesforce App

Our latest round of new and improved Salesforce app features makes it easier to access Salesforce on the go.

The Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each Salesforce app user.

Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Salesforce Mobile Web	Setup in the Full Site
Device and Browser Support				
Run Salesforce on Your iPhone X		✓		
Search				
New Search Experience in Salesforce for iOS	✓	✓	(As of v13.0)	(New in v15.0)
Sales Features				
See Einstein Insights About Your Accounts and Opportunities (Pilot)	✓	✓		
Add Account Team Members to Opportunity Teams	✓	✓	✓	✓
Use Path to Build Relationships with Accounts	✓	✓	✓	✓
Use Path to Track Campaign Progress	✓	✓	✓	✓
See More on the Go with Enterprise Territory Management	✓	✓	✓	
Productivity Features				
Give More Reps Access to Attendees	✓	✓	✓	✓
Access and Collaborate in the Quip App	✓	✓	✓	
Google Integration Features				
Give More Google Users Access to Attendees	✓	✓	✓	✓
Sync Events from Salesforce to Google Calendar™ Only	✓	✓	✓	✓

Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Salesforce Mobile Web	Setup in the Full Site
Sync Person Accounts with Google Contacts	✓	✓	✓	✓
Microsoft Integration Features				
Give More Microsoft® Exchange Users Access to Attendees	✓	✓	✓	✓
Sync Events from Salesforce to Microsoft® Exchange Only	✓	✓	✓	✓
Sync Events Both Ways for Reps on Microsoft® Exchange 2013 and 2016	✓	✓	✓	✓
Sync Person Accounts with Microsoft® Contacts	✓	✓	✓	✓
Customer Service Features				
View and Manage Service Crews in the Salesforce App	✓	✓	✓	✓
Track Product and Inventory Returns with Return Orders	✓	✓	✓	✓
Reports and Dashboards				
Legacy Charts for Salesforce Mobile Retire in Spring '18	✓	✓	✓	
Chatter				
Add Style to Your Mobile Posts and Comments (Pilot)	✓	✓	✓	
Get Push Notifications for Group Mentions	✓	✓	✓	✓
Feeds Tab Renamed on Your Mobile Devices	✓	✓	✓	
Share Content with the New Chatter Post Composer	✓ (New in v15.0)	✓ (As of v14.0)		
Share Content with the New Chatter Post Composer	✓ (New in v15.0)	✓ (As of v14.0)		
View Inline Images and Multiple Attachments in the Chatter Feed	✓ (New in v15.0)	✓ (As of v14.0)		
Access Your Custom Feeds with Chatter Streams	✓	✓		✓
Business Logic and Process Automation				
Launch a Flow from an Object-Specific Action (Generally Available)	✓	✓	✓	✓
Other Enhancements				
Create Shortcuts to Your Top Salesforce Pages with Favorites	✓	✓		
Animate Your Messages with Third-Party Keyboards		✓		

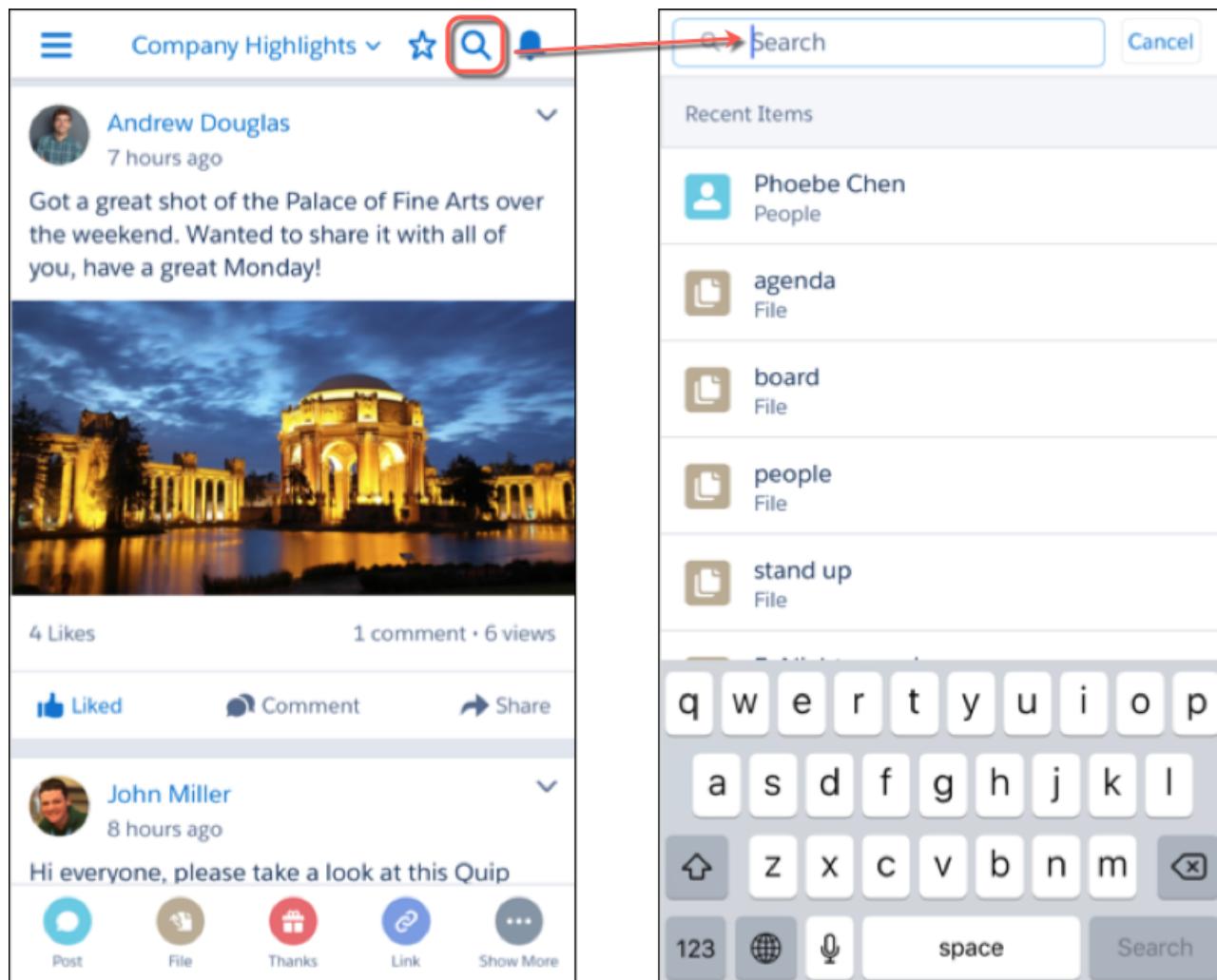
Run Salesforce on Your iPhone X

Salesforce for iOS is fully supported on the new iPhone X. Take advantage of the edge to edge screen and enhanced display the iPhone X has to offer while working with Salesforce on the go. The iPhone X is supported in version 15.0 or later of Salesforce for iOS.

New Search Experience in Salesforce for iOS

It's easier than ever to find records and other entities using the new and improved search experience in Salesforce for iOS. The new search experience is based off the Lightning Experience in the full Salesforce site. The new search experience is intuitive and easy to use for users who are familiar with Lightning Experience. This new feature is available in the Salesforce for iOS, version 15.0 or later.

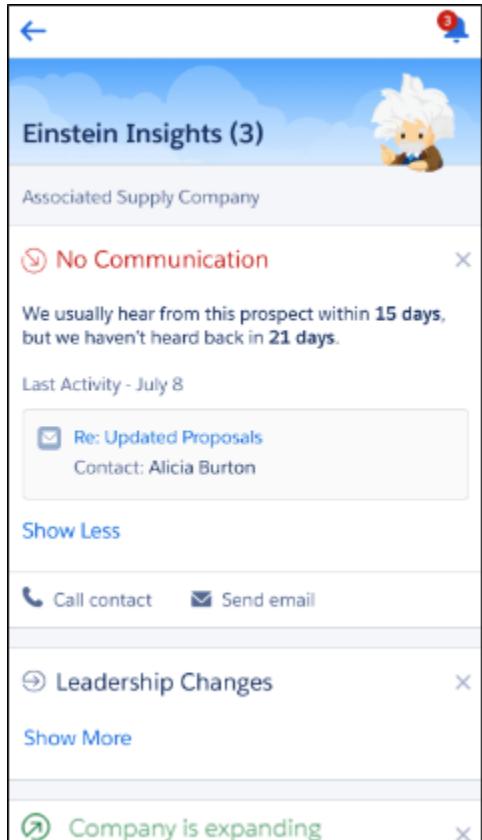
The new search experience is now accessible anywhere in the app. Users can tap  anywhere in the app to kick off a search.



See Einstein Insights About Your Accounts and Opportunities (Pilot)

Einstein Insights are now on your mobile device. Stay informed with insights about your accounts. See predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place. Reps can take action directly from the insights, including editing the related record or sending emails to relevant contacts. This change applies to Salesforce for iOS and Salesforce for Android.

To access insights, tap  in the left nav.



You need Sales Cloud Einstein licenses to view insights in the mobile app. Sharing actions, activity timeline details, and suggested contact insights are available in Lightning Experience only.

See More on the Go with Enterprise Territory Management

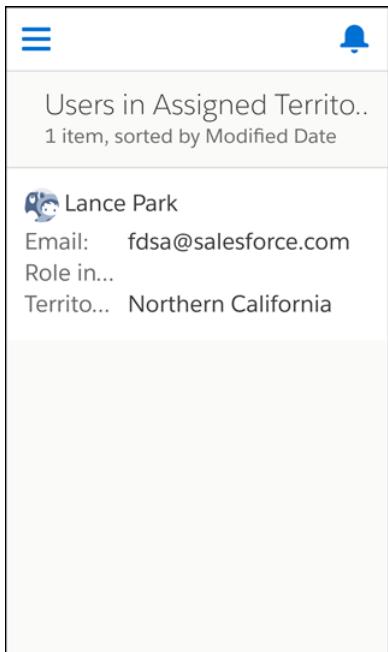
Mobile reps now get the Users in Assigned Territories related list on accounts. This change applies to all versions of the Salesforce app.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

EDITIONS

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud



Access and Collaborate in the Quip App

Collaborating with coworkers over Quip on the go is easier than ever. Whether you get your Quip link from an email or from Salesforce, all Quip links open in the Quip mobile app. This functionality is available in all versions of the Salesforce app.

The Quip mobile app is available from the App Store and Google Play. Use the Quip app to edit your documents and collaborate with coworkers. You can seamlessly navigate between your Quip docs and Salesforce to do your work from anywhere.

	A	B	C
1	Last Name	First Name	Email Address
2	Brown	Jeffrey	jbrown@bran...
3	Chen	Phoebe	pchen1@bran...
4	Douglas	Andrew	adouglas@bran...
5	Green	Chris	cgreen@bran...
6	Miller	John	jmillier1@bran...
7	Shields	Mary	mshields@bran...
8	Smith	Carrie	admin@bran...
9	Snyder	Emily	esnyder@bran...
10	Thomas	Elizabeth	ethomas@bran...
11	Willis	Landon	lwillis@bran...
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Note: Only users with access to a Quip document are able to open it in the Quip app.

Legacy Charts for Salesforce Mobile Retire in Spring '18

Legacy Charts have been part of the Salesforce for Android, Salesforce for iOS, and Salesforce mobile web experience for many years, but let's bid them farewell. Enhanced Charts, the mobile version of Lightning Experience charts, have replaced Legacy Charts in Salesforce for Android, Salesforce for iOS, and Salesforce mobile web. This change applies to all versions of the Salesforce app.

Here's what the Legacy Charts retirement means for your org.

- In Spring '18, Salesforce for Android, Salesforce for iOS, and Salesforce mobile web include only Enhanced Charts, and you can't switch back to Legacy Charts.
- Orgs created during or after the Summer '16 release already have Enhanced Charts as the only charts experience for Salesforce for Android, Salesforce for iOS, and Salesforce mobile web. For these orgs, nothing changes.
- The legacy Charts retirement doesn't affect charts in the full Salesforce site (Salesforce Classic and Lightning Experience).

Editions

Enhanced Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

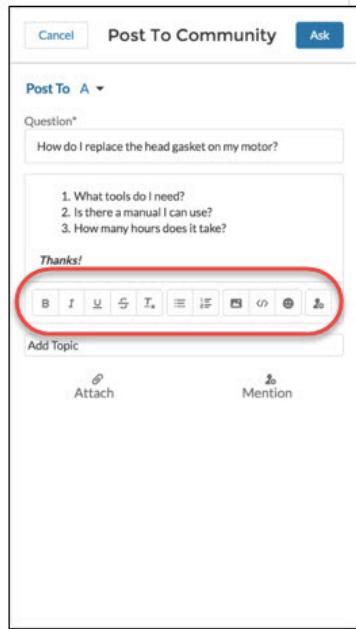
Add Style to Posts and Comments on the Go (Pilot)

Our rich text editor has come to Salesforce mobile. Instead of the plodding sameness of plain text posts, users can add emphasis, personality, and lists. Use the editor when you compose or edit posts, comments, questions, and answers. This change also means that you can edit the posts you added from your desktop when you're on the go. This feature is new in all versions of the Salesforce app.



Note: We provide the mobile rich text editor to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Contact Salesforce Support to enable this pilot feature.



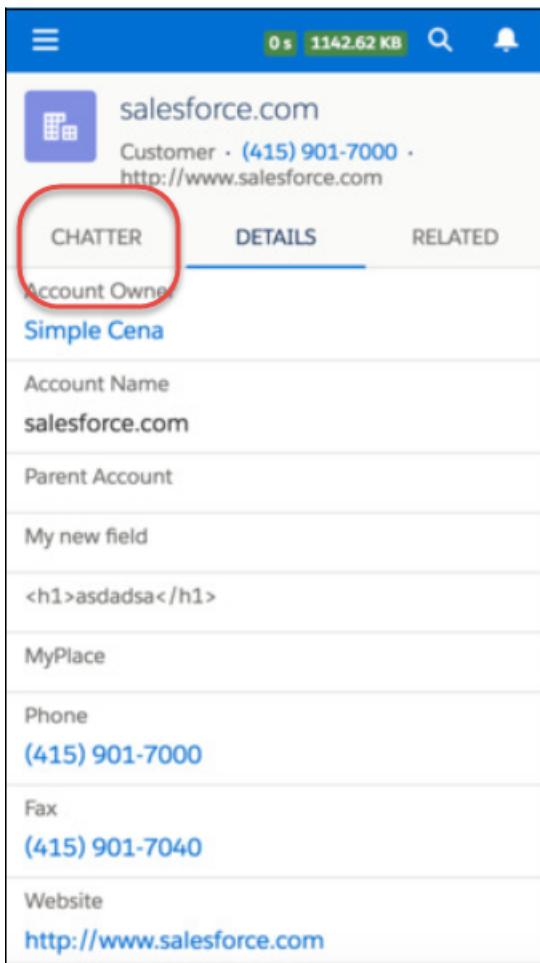
Get Push Notifications for Group Mentions

Group members have a new opportunity to be more responsive when their group is @mentioned. Group mentions now trigger push notifications. You're on the road, with only a phone to keep you tethered to that vital business you're on. Now you can count on it to keep you tuned in to the things that people want your group to be aware of. This feature is new in all versions of the Salesforce app.

To be notified about group mentions, members must select **Email on every post** under Groups in their Chatter email notifications settings. After notification is enabled, you can get push notifications on mobile devices by enabling **Someone @mentions your group** under Push Notification Settings.

Feeds Tab Renamed on Your Mobile Devices

The Feeds tab on the records you view from your mobile device are now labeled Chatter. This feature is new in all versions of the Salesforce app.



Share Content with the New Chatter Post Composer

Enjoy the modern Chatter post composer when creating posts, attaching images and files, and mentioning users or groups. The new composer makes sharing updates easier and more enjoyable with a new look and full-size image preview. The new Chatter post composer is available in Salesforce for Android, version 15.0 or later.

Full-size images and attachments show up in the composer so sharing the best photo from an event or most important slide from a presentation easily. You can quickly delete an image or file and attach a new one before or after crafting the text of your post.

Create Post Post

 Andrew Douglas
To My Followers

Got a great shot of the Palace of Fine Arts over the weekend. Wanted to share it with all of you, have a great Monday!



X

• Mention

CAMERA Photo / Video

FILE File

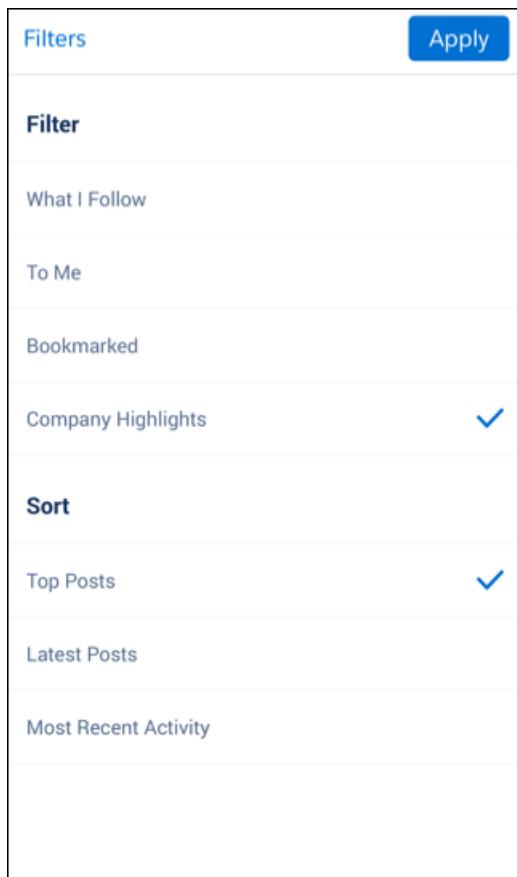
Enjoy a Modern Chatter Experience in Salesforce for Android

The new Chatter experience delights with smoother scrolling and a more intuitive user experience. We've added a Company Highlights feed and the ability to share Chatter posts directly from your feed. This new experience is available in Salesforce for Android, version 15.0 or later.

With the new Chatter feed experience, enjoy a faster and modern feed for collaborating with coworkers and customers.

Company Highlights Feed

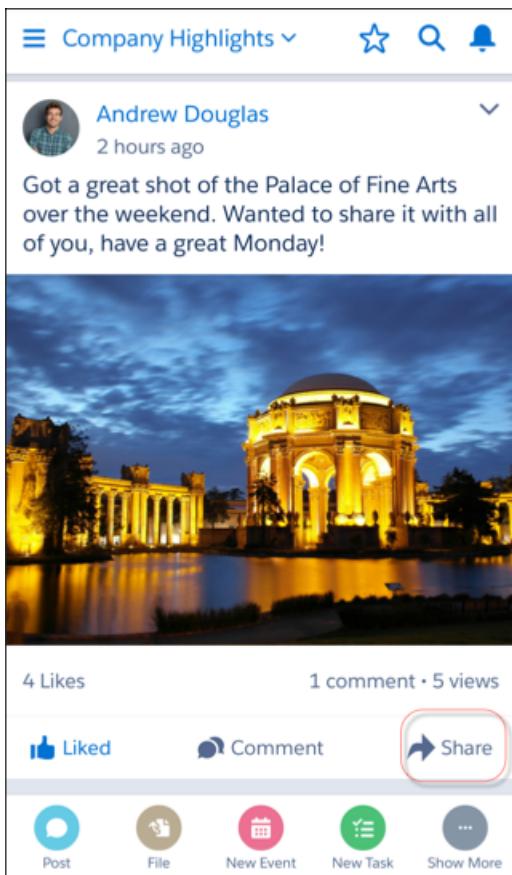
Use the Company Highlights feed to stay in the loop with trending conversations at your company. When you're short on time, you can still engage with top posts and make sure you're caught up with the latest company updates. Tap the top of your feed to sort and filter posts based on your priorities. Change your filters as often as you'd like and never miss another update.



 **Note:** If you miss the **All Company** feed, select the **Company Highlights** and **Most Recent Activity** filters for the same feed experience.

Share from Your Chatter Feed

Share posts directly from the feed to followers or groups and include your own thoughts to add to the conversation. You no longer need to tap into the feed detail page to share posts with your followers or groups. Just scroll, share, and get back to work.



View Inline Images and Multiple Attachments in the Chatter Feed

As part of the new Chatter experience, users can see inline images and multiple attachments in each post in the feed. Now there's no need to tap into each post to see inline images, providing more context while scrolling through the Chatter feed. This new functionality is available in Salesforce for Android, version 15.0 or later.

Inline images show up in the Chatter feed and feed detail page.

Carrie Smith Edited 1 minute ago

Thanks to everyone for your hard work this quarter! Here's our notes from today:

And a picture of our great mobile product team!

Post **File** **Thanks** **Link** **Show More**

Note: Users can view inline images, but can't post inline images from Salesforce for Android.

Posts with multiple attachments show a side by side preview of the first two items. If there's more than two items attached, a + button lets you know to open the feed detail to see more.

The screenshot shows the Salesforce mobile app interface. At the top, there's a navigation bar with a menu icon, the text "Company Highlights", and icons for search, star, and notifications. Below this is a search bar with the placeholder "Search this feed...".

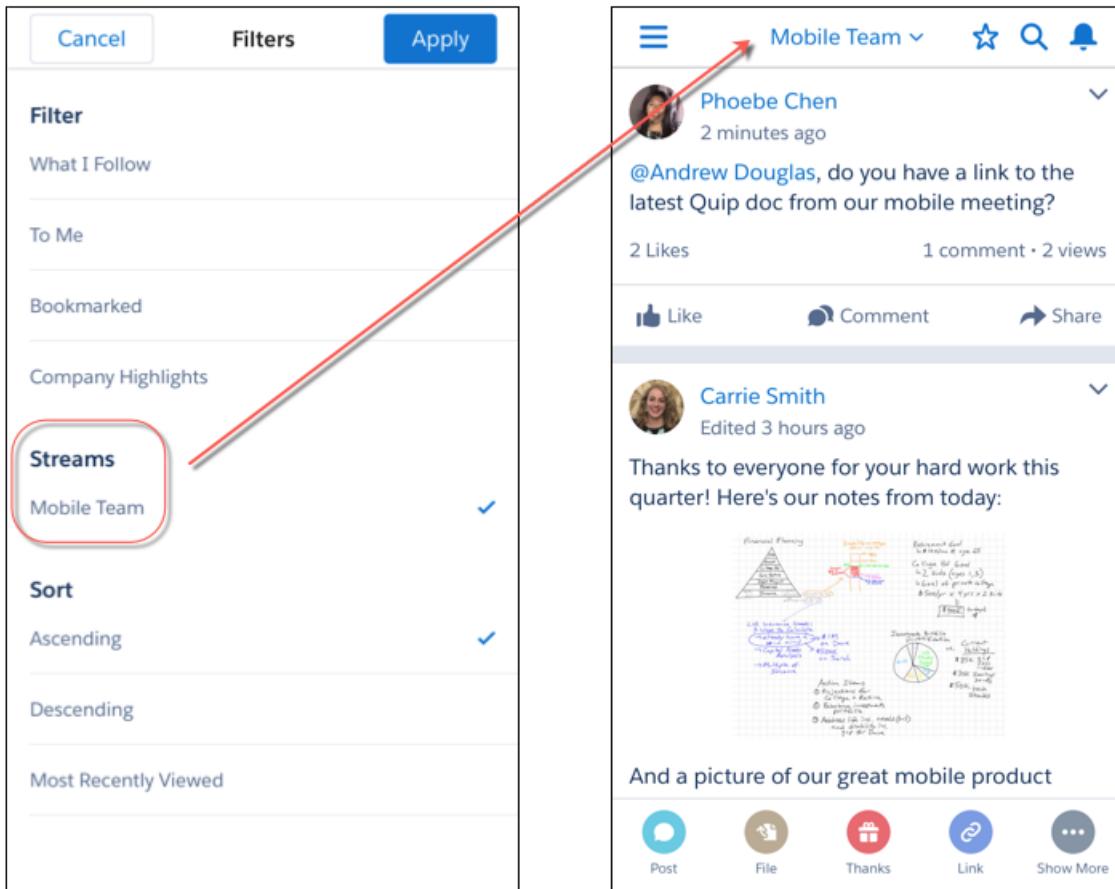
Post by John Miller: John Miller posted 2 minutes ago. The post content is: "Here's the rest of the brainstorming notes I collected from the Q4 wrap up today!" Below the text are two images: a list of notes and a mind map diagram. The notes list includes items like "Define & elaborate Blueprint", "Define Meaning of Recognition", etc. The mind map has a central node "+3" connected to several other nodes.

Post by Carrie Smith: Carrie Smith edited 29 minutes ago. The post content is: "Thanks to everyone for your hard work this quarter! Here's our notes from today..." Below the text are five circular icons with labels: Post, File, Thanks, Link, and Show More.

Note: Users can only attach one image or attachment to each post from Salesforce for Android.

Access Your Custom Feeds with Chatter Streams

The Chatter streams you enjoy in Lightning Experience are available for browsing on all your mobile devices. Feeds combine all your favorite posts from people, groups, and records, like your accounts, opportunities, and cases. Chatter streams are available in Salesforce for Android and iOS, version 15.0 or later.



 **Note:** You can view all your Chatter streams on Salesforce for Android and iOS, but you can't build new streams or edit streams from the mobile app.

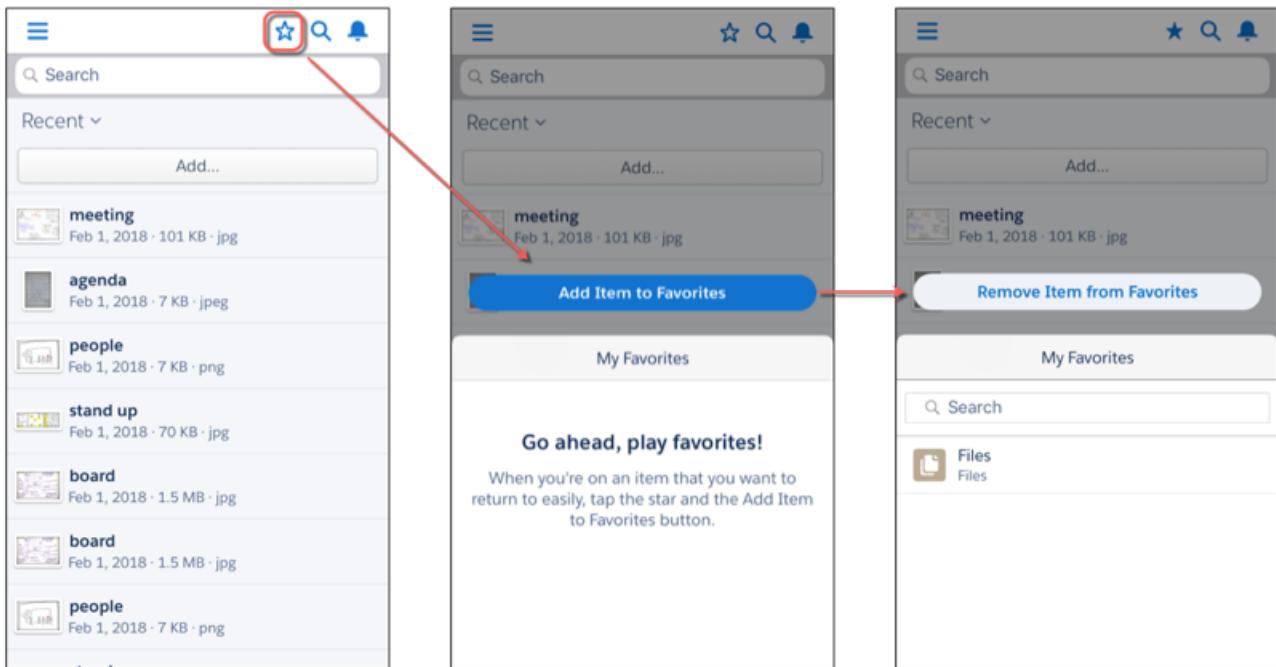
Create Shortcuts to Your Top Salesforce Pages with Favorites

The favorites experience on mobile mirrors Lightning Experience favorites on the full Salesforce site. Favorites can be added or removed on any device and you'll see the same final result no matter where you access Salesforce. Favorites are available in Salesforce for Android and iOS, version 15.0 or later.

Favorites let you quickly access important records, lists, groups, dashboards, and other frequently used pages in Salesforce. They're similar to bookmarks in a web browser but better because your favorites are available no matter which browser or device you use to log in to Salesforce.

Click the star () to add the current page—for example, all open leads—to your favorites. A highlighted star () means you're on a favorite page. To remove a favorite, click the highlighted star.

Your saved favorites are just a click away in your favorites list, where you can find and manage all your favorites.



Keep these considerations in mind when working with favorites.

- You can have up to 200 favorites, which support these types of content.
 - Record home for standard and custom objects (including Visualforce overrides of these record views)
 - Lists
 - Dashboards
 - Reports
 - Report and dashboard folders
 - Chatter groups
-  **Note:** You can't favorite list views on the Reports, Dashboards, Files, Tasks, and Notes tabs. You also can't favorite Visualforce overrides of list views and individual Chatter posts.
- You can't favorite things in setup pages, but you can still access your favorites from these areas.
 - Only individual users can manage favorites. They can't be shared or edited by Salesforce admins.

Upload Files with the File Upload Component and Cloud Flow Designer

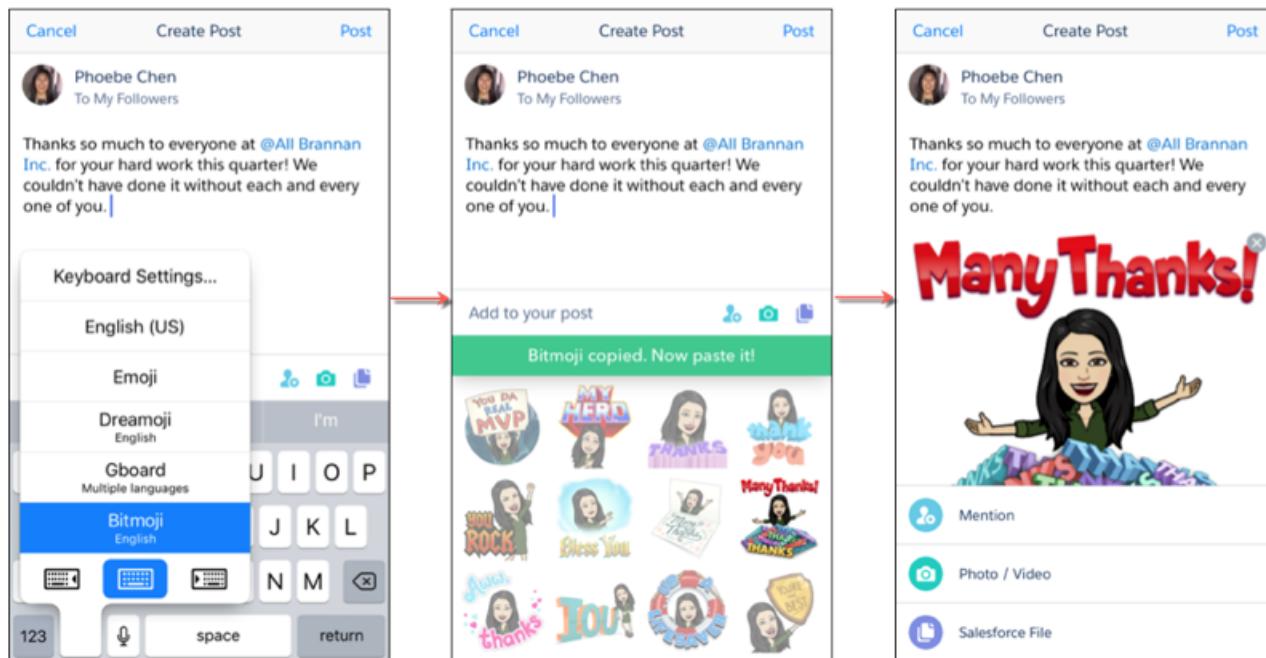
You can now attach files from flows when you use the File Upload Component. You can also create screens in the Cloud Flow Designer. This change applies to Lightning Experience and Salesforce mobile web. However, it only works for Lightning flow runtime.



Animate Your Messages with Third-Party Keyboards

Salesforce for iOS users can spice up their posts and comments thanks to support for third-party keyboards like Bitmoji and Gboard. Third-party keyboard support is available in Salesforce for iOS, version 15.0 or later.

To access third-party keyboards in the Salesforce app, download a keyboard from the App Store. Install your favorite keyboards and start adding stickers, search results, videos, and more to your Salesforce posts.



Spring '18 Features That Are Different or Not Available in the Salesforce App

The Salesforce mobile app doesn't include all the functionality that's available in the full Salesforce site, whether your org is using Lightning Experience or Salesforce Classic. Learn about the Spring '18 Salesforce enhancements that either aren't available in the Salesforce app, have functional gaps from the full site, or work differently in the app.

-  **Note:** For the complete list of differences between the Salesforce app and the full site, see [What's Different or Not Available in the Salesforce App](#) in the Salesforce Help.

Productivity Features

Activity Reminders

You can set activity reminders from your tasks and events, but you can only see the reminders from Lightning Experience.

Event Attendees

Event attendees are like invitees in Salesforce Classic, but are available in Lightning Experience and the Salesforce app. Working with attendees requires Lightning Sync and a compatible Microsoft® Exchange or Google G Suite account. In addition, event organizers have to create or edit events from Lightning Experience, the Salesforce app, or (if syncing both ways) their Microsoft or Google calendars. Event organizers can invite or remove contacts, leads, and other Salesforce users to their events when set up to sync both ways, Salesforce to Google, or Salesforce to Exchange. All reps can view attendees and attendees sync with their calendar applications when set up with any sync direction. Setting up attendees in Lightning Experience and the Salesforce app limits some Salesforce Classic functionality. See [Lightning Sync Considerations](#) in Salesforce Help.

Salesforce Authenticator: Improved Communication and Activity Tracking

Salesforce Authenticator v2.11 now communicates more clearly with you. Stay on top of each verification activity's full history, including the action, date, location, device, and response.

IN THIS SECTION:

[Track Account Activity on Salesforce Authenticator](#)

Users can now track all details of their account activity with Salesforce Authenticator v2.11. Stay on top of each activity's full history, including the action, date, location, device, and response, by tapping the activity in your activity list. This feature is available on both Android and iOS.

[Easily Connect to Salesforce Authenticator with a Guided Tour](#)

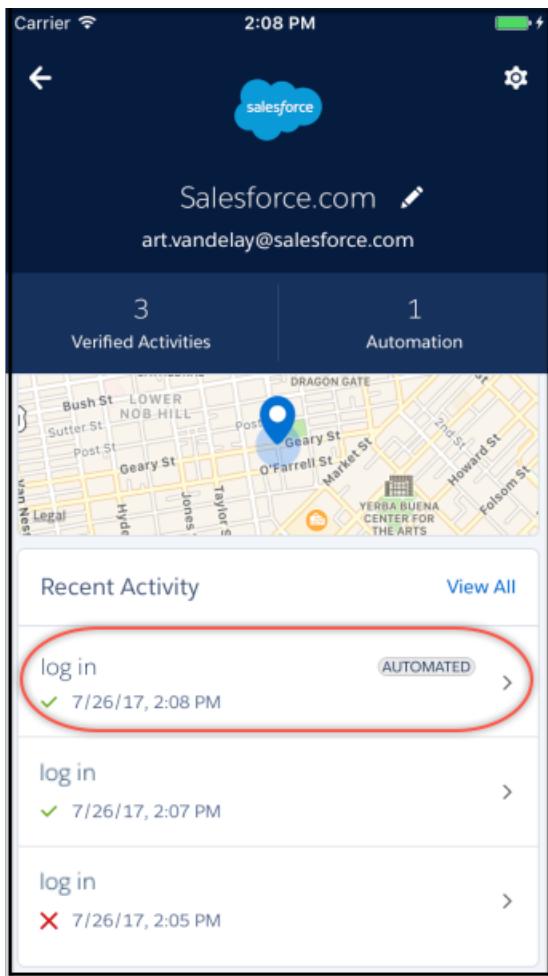
Connecting your Salesforce account with Salesforce Authenticator is easier as we walk you through the pairing process. You can add a Salesforce account using either a QR code or a two-word phrase. The tour is available on Android and iOS.

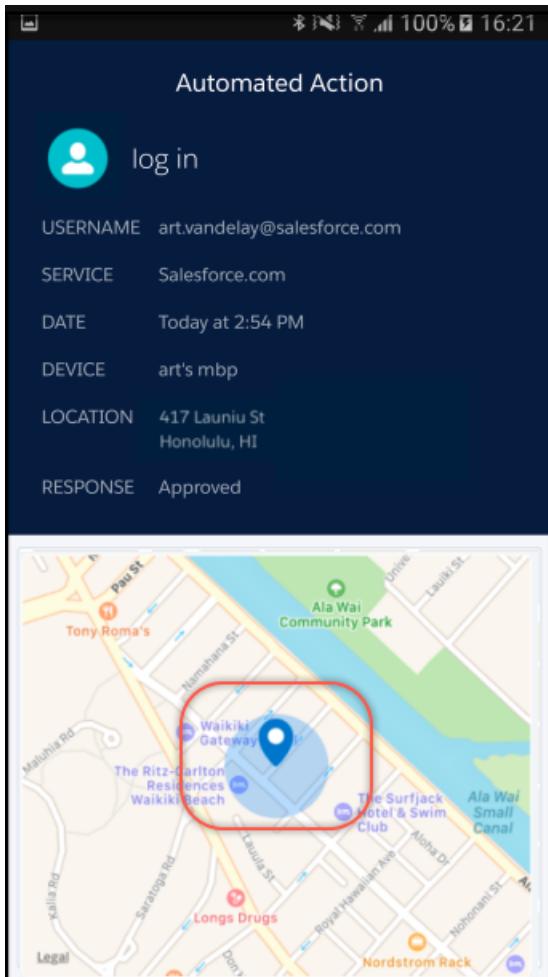
[Clearer Notifications When Automation Services Are Disabled or Aren't Available](#)

New notification text more clearly states the status of Authenticator. If an admin disabled automation for the org, the Authenticator notification reflects that information. If the user disabled location services for the app, or location services aren't available for Authenticator, the notification shows the status. When automation is enabled, the Deny functionality is disabled. This feature is available on both Android and iOS.

Track Account Activity on Salesforce Authenticator

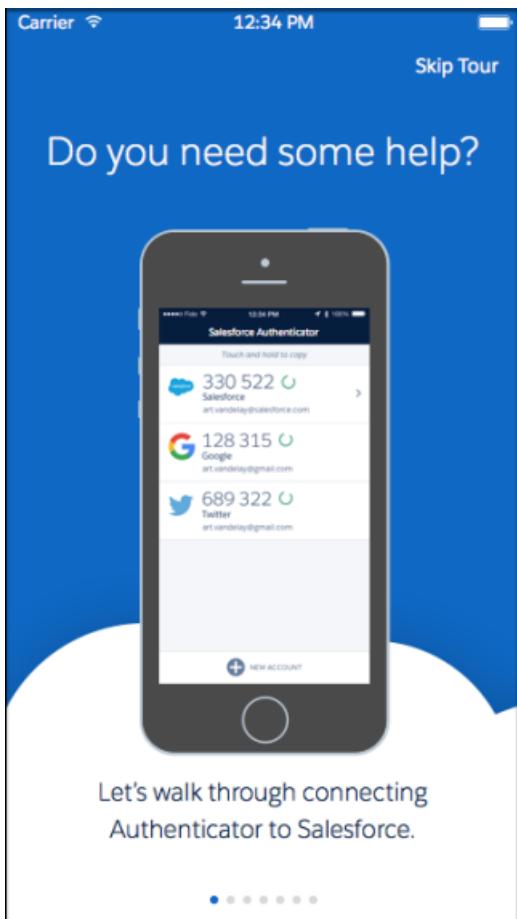
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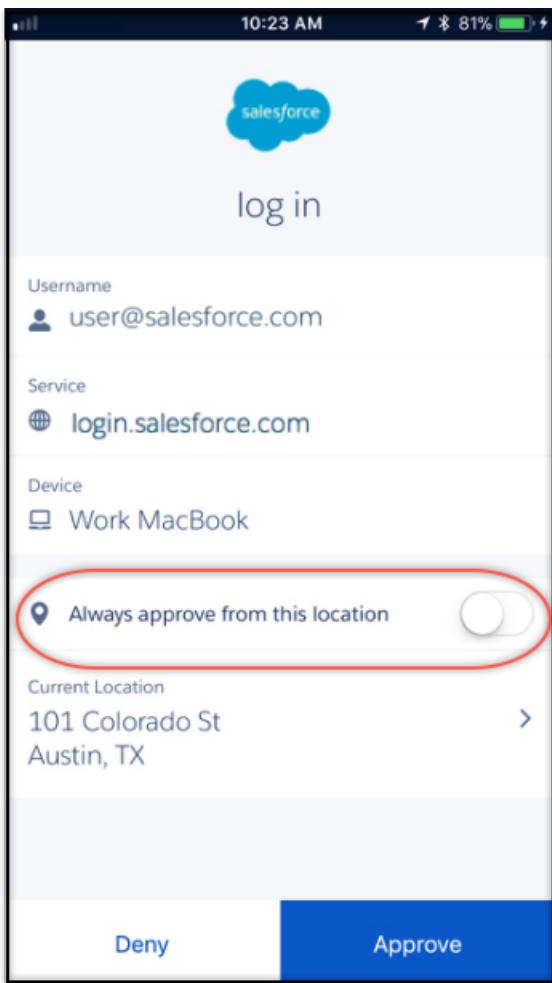
Easily Connect to Salesforce Authenticator with a Guided Tour

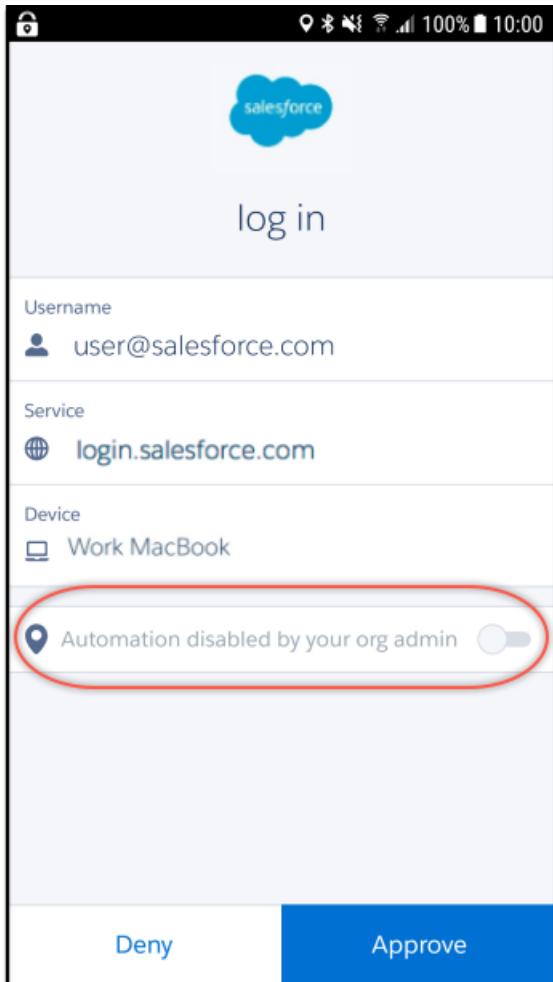
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Financial Services Cloud: Client Expressed Interests Component, Accelerated Data Loads, and Person Accounts

Users can quickly capture what's top of mind for their customers, whether it's retirement savings or a savings account, and see it all on the client profile with the Client Expressed Interests component. Upload large batch sizes lickety-split with Accelerated Data Loads, our enhancements to bulk uploads. Plus, you can leverage person accounts in Financial Services Cloud. And there's more—keep reading!

IN THIS SECTION:

[Capture and View Customer Needs with the Client Expressed Interests Component](#)

Let's say a checking account customer is interested in a mortgage. Without reentering data, it's quick to capture customer needs with a new standard action on the Client Expressed Interests component. And it's easy to see all open referrals based on expressed interests on the client profile, as well as the potential value of referrals.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions

[Upload Faster with Accelerated Data Loads](#)

Following our enhancements to bulk uploads, it's a snap to upload large batch sizes using Bulk API or Data Loader for the Individual and Financial Account objects.

[Leverage Person Accounts for Financial Services Cloud](#)

If you're new to Financial Services Cloud, good news! You can now use either person accounts or the individual object model.

[Usability and Other Enhancements to Financial Services Cloud](#)

Take a look at these additional enhancements.

[New Custom Fields for Financial Services Cloud Objects](#)

These custom fields are new to standard and custom objects.

Capture and View Customer Needs with the Client Expressed Interests Component

Let's say a checking account customer is interested in a mortgage. Without reentering data, it's quick to capture customer needs with a new standard action on the Client Expressed Interests component. And it's easy to see all open referrals based on expressed interests on the client profile, as well as the potential value of referrals.

Upload Faster with Accelerated Data Loads

Following our enhancements to bulk uploads, it's a snap to upload large batch sizes using Bulk API or Data Loader for the Individual and Financial Account objects.

And you get fewer row lock errors and better error handling.

SEE ALSO:

- [Load Data](#)

Leverage Person Accounts for Financial Services Cloud

If you're new to Financial Services Cloud, good news! You can now use either person accounts or the individual object model.

Use person accounts to store customer information in a single record in Financial Services Cloud. Person accounts bring together fields from Account and Contact to provide a completely customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing.

Financial Services Cloud enables person accounts in trial orgs by default. However, it's easy to enable the individual object model with a simple setup step.

If you currently use person accounts in your org, you may have the option of upgrading to Financial Services Cloud without migrating to a new org.



Note: Review your customizations (to components and triggers, for example) before upgrading to person accounts in Financial Services Cloud within your current org or in a new org.

SEE ALSO:

- [Person Accounts](#)

Usability and Other Enhancements to Financial Services Cloud

Take a look at these additional enhancements.

- **Stricter Entity Visibility Option on the Relationship Map**

Show or hide relationships on the relationship map based on user permissions to comply with privacy regulations and policies. Enable stricter entity visibility so that only users with at least read access on the Account and Contact records in an Account Contact Relationship see the record in the relationship map.

- **Strategic Partner Integration**

An Insurance Console app and custom fields for policy term and total premium empower strategic partners and customers to create a customized view of insurance policyholders.

New Custom Fields for Financial Services Cloud Objects

These custom fields are new to standard and custom objects.

Account standard object has a new custom field.

TotalPremium__c

Policyholder's total annual premium.

FinancialAccount__c custom object has new custom fields.

PolicyTerm__c

The period of coverage provided by the policy.

ProductName__c

Product name.

Lead standard object has a new custom field.

RelatedAccount__c

Individual or household account related to a lead.

Health Cloud: Flexible Care Plans, Health Assessments, Care Gaps

With goals decoupled from problems, you can use the Health Cloud data model in the way that's right for you. Health Cloud helps you identify gaps in a patient's care, and you can gather survey information to help manage your patients more efficiently.

Health Cloud is available in Salesforce Classic and Lightning Experience.

Available in: **Enterprise, Performance, and Unlimited** Editions

IN THIS SECTION:

[Customize Care with Flexible Care Plans](#)

Flexible Care Plans decouple goals from problems, so that you can use the Health Cloud data model in a way that reflects your org's specific approach to a patient's health problems.

[Track Care Gaps to Improve Care Coordination](#)

Prioritizing health activities is difficult and complex. Now Health Cloud helps you prioritize efficiently by surfacing gaps in a patient's care where your team can make a difference. To close a care gap, you tie it to a support process.

[Use Assessments to Gather Patient Information](#)

Improve the quality of patient care by gathering information that helps to manage your patients more efficiently. Whether it's a pre-surgery assessment or a patient feedback survey, you have the information you need within the patient's care plan.

Customize Care with Flexible Care Plans

Flexible Care Plans decouple goals from problems, so that you can use the Health Cloud data model in a way that reflects your org's specific approach to a patient's health problems.

What you're doing in relation to the patient will influence how you want to look at the Care Plan. With Flexible Care Plans, you will find a number of ways to manage a patient's care.

Problem View

Sometimes the best way to view a patient's care plan is from the point of problems facing the patient. Clicking on Problems in the Care Plan menu bar presents those problems directly, and links to the goals and tasks associated with that problem.

Goal View

If you're most interested in the goals, then you can organize your Care Plan interface by goals. Goals are the patient objectives that help achieve an improved outcome for a problem. A patient can have as many goals as they need. Goals don't require a related Problem. Problems are linked directly to the Patient, not to the Care Plan, since not all patients who have a Problem list have a Care Plan.

Task View

If you're a nurse or caregiver, you're probably interested in seeing the tasks that a patient's care plan lays out for you to take care of. Clicking on **Tasks** in the care plan menu bar presents each task and the goals and problems associated with that task.

Admins can create new tabs to fit their own work processes. Tabs can group by Goal, Problem, Assigned To, or Due Date. "No grouping" is also an option.

And if you like your current three-level view, you don't have to give it up. You can still get that view by using the "Problems and Goals" tab.

Track Care Gaps to Improve Care Coordination

Prioritizing health activities is difficult and complex. Now Health Cloud helps you prioritize efficiently by surfacing gaps in a patient's care where your team can make a difference. To close a care gap, you tie it to a support process.

Care coordinators can use this capacity to improve patient outcomes. Population health analysts may find it helpful in learning which patients have the highest likelihood of improvement after a particular intervention.

To start using Care Gaps, add it to the Patient Card dropdown in Custom Settings.

Care Gaps

	OPEN	CLOSED	ALL			
SORT ORDER	NAME		STATUS	DUE DATE	SOURCE	OWNER
0	Heart - ASCVD - Statin		New	May 15, 2017	 Einstein	HealthCloud Admin ▼
3	Screening - Cervical Ca...		New	Jun 17, 2017	 Einstein	HealthCloud Admin ▼

Multiple source systems can create Care Gap records in Health Cloud. You can make it easier to identify the source of a record by having a logo automatically attach to it.

If your Care Gaps data is complex and hard to scan, use the search bar to find data in your Care Gaps display.

Use Assessments to Gather Patient Information

Improve the quality of patient care by gathering information that helps to manage your patients more efficiently. Whether it's a pre-surgery assessment or a patient feedback survey, you have the information you need within the patient's care plan.

With Surveys, you can create beautiful, easy-to-use forms for collecting feedback and data from your users or customers. You can customize survey questions and answers in a simple editor. You can add various types of questions to gather the exact data you need. View the surveys that are available to send to patients on the Assessments tab of the Health Cloud console. You can also find completed surveys for patients and drill into to see their answers.

From within each patient's care plan, see the list of surveys that are available to send to that patient. With a simple click, the email invitation is on its way to the patient. When the patient clicks the survey link within the email, they can log in to the community and complete the survey.

To see the survey responses, open the survey from the Sent to Patient tab. The Sent to Patient tab lists all the surveys that have been sent to that patient. Easily view the date the survey was sent, whether it's been completed, its status, and the version of the survey you're viewing.

Customization: Lightning Apps in Lightning App Builder, Richer Flow Screens, Time Field

While you're making your Home and App pages more dynamic, modify your Lightning apps with the same tool: the Lightning App Builder. Make your flows more awesome by embedding custom Lightning components in your screens and showing users which stage of the flow they're at. Start tracking time-only data with the new Time field type.

IN THIS SECTION:

[Lightning App Builder: Lightning App Customization, Field Traversal in Component Visibility Rules, New Page Templates, and New Components](#)

The Lightning App Builder is now the one-stop shop for Lightning app customization and page management. Edit app branding, options, navigation items, the utility bar, and open and create Lightning pages for your app—all without leaving the App Builder. You can now span to related fields and objects in Lightning component visibility rules, and configure rules for components on app and Home pages. But wait, there's more! Check out the new templates for console pages and new standard components. The Lightning App Builder is available in both Lightning Experience and Salesforce Classic. Unless otherwise noted, the feature changes are only for Lightning Experience.

[Flow: Lightning Components in Screens, Stages, Autolaunch in Lightning Console Apps](#)

With Lightning components, you can build flow screens that look and behave however you want. Use stages to indicate where in the flow a user is at any given time. Then rig that flow up in your Lightning console app so that it autolaunches in a subtab. These changes apply to both Lightning Experience and Salesforce Classic.

[Fields and Picklists: Time Field Type Beta and Picklist Conversion Enhancement for Record Types](#)

All editions get the time custom field beta. Picklist value settings for record types are preserved when you convert the field to a multi-select picklist.

[User Setup: Self-Deactivating External Accounts, New Location for Enhanced Profile Settings](#)

Let external users deactivate their own accounts when they want on the User Management Settings page. Conveniently manage enhanced profile list views and the enhanced profile user interface options here as well. Formerly these options resided on the User Interface page. This change applies to both Lightning Experience and Salesforce Classic.

[Salesforce Connect: Debugging External Object Access, Continued Pilot for Callout Event Monitoring, Metadata API Support for Compact Layouts on External Objects, and an Improved OData 2.0 Adapter for New Orgs](#)

Use new and updated event types to troubleshoot problems accessing external object data. Try out the improved log data for tracking external object data callouts with event log files, and let us know what you think. Retrieve and deploy compact layouts for external objects. When you create a new org, you also get an improved OData 2.0 adapter.

[General Setup: Experienced-Based Action Overrides, A Granular User Permission for Roles, List Custom Setting Management](#)

Create a different standard action override for each experience: Lightning Experience, Salesforce Classic, and mobile. If a user needs to be able to look at roles or the role hierarchy, there's a new user permission for that. You no longer have to give the user View Setup and Configuration. In the user interface, flip a switch to let you and other admins create custom settings of type List. All that, and we renamed the user permission that lets users use customized actions.

[AppExchange: More Payment Options and Enhanced Installs](#)

AppExchange Checkout now lets you pay with your bank account, giving you more flexibility when you're ready to buy an app, component, or other product. We also give you more information about the approval status of managed packages during installation.

Lightning App Builder: Lightning App Customization, Field Traversal in Component Visibility Rules, New Page Templates, and New Components

The Lightning App Builder is now the one-stop shop for Lightning app customization and page management. Edit app branding, options, navigation items, the utility bar, and open and create Lightning pages for your app—all without leaving the App Builder. You can now span to related fields and objects in Lightning component visibility rules, and configure rules for components on app and Home pages. But wait, there's more! Check out the new templates for console pages and new standard components. The Lightning App Builder is available in both Lightning Experience and Salesforce Classic. Unless otherwise noted, the feature changes are only for Lightning Experience.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Edit Lightning Apps with the Lightning App Builder](#)

Now when you edit a Lightning app from the App Manager in Setup, you're brought into the Lightning App Builder to manage the app's settings. Update app branding, navigation, app options, and manage the Lightning pages assigned to that app all in one place.

[Manage Your Lightning Pages Inside the Lightning App Builder](#)

The list of Lightning pages in Setup is no longer the only way you can view and manage Lightning pages in your org. We added a page menu inside the Lightning App Builder so that you can work on Lightning pages without switching back and forth to Setup. You can even create pages right from the list.

[Make Your Lightning App and Home Pages Dynamic](#)

Setting visibility conditions for components isn't limited to record pages anymore. Now you can set visibility rules on Lightning app and Home pages too.

[Include Related Fields and Other Objects in Component Visibility Rules](#)

Previously, you could only define component visibility rules on Lightning record pages based on the fields directly on the record. Now you can create filters that are much more robust.

[See Assigned Apps on App Page Detail Pages](#)

We added a new related list to the detail page for Lightning app pages. When you view your page details, you can see a list of all Lightning apps that include that page.

[Organize Components into Collapsible Sections](#)

Manage screen clutter by grouping components into collapsible sections. The new Accordion component is like the Tabs component, but vertically stacked. You can use the Accordion component on all record pages. This feature is new in Lightning Experience.

[Create Pinned Region Pages for Your Console Apps](#)

A pinned region remains displayed as you navigate to subtabs in a Lightning console app. Three new page templates are available for Lightning console apps to make it easier for console users to work with records. This feature is new in Lightning Experience.

[Display Paused Flow Interviews on Home Pages](#)

Use the new Paused Flow Interviews component to let your users resume interviews in Lightning Experience. A flow interview is a running instance of a flow. The component displays up to five interviews that the user owns or that have been shared with the user. This component is supported only on Home pages. This feature is new in Lightning Experience.

[Gather Feedback from Users with the Surveys Component](#)

Use the Surveys component to embed an active survey in your Lightning page. This component is available for all types of Lightning pages.

[Use F6 to Switch Lightning App Builder Panel Focus](#)

Now you need only one key—F6—to switch focus between panels in the Lightning App Builder. Using Alt+1 through Alt+5 is no longer supported.

Edit Lightning Apps with the Lightning App Builder

Now when you edit a Lightning app from the App Manager in Setup, you're brought into the Lightning App Builder to manage the app's settings. Update app branding, navigation, app options, and manage the Lightning pages assigned to that app all in one place.

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, there's a sidebar with 'APP SETTINGS' and links to 'App Details & Branding', 'App Options', 'Utility Bar', 'Select Items', and 'Assign to User Profiles'. The main area has two columns: 'App Details' and 'App Branding'. In 'App Details', there are fields for 'App Name' (Inside Sales), 'Developer Name' (Inside_Sales), and 'Description' (Enter a description...). In 'App Branding', there's an 'Image' field with an 'Upload' button, a color picker set to '#0070D2', and a checked checkbox for 'Use the app's image and color instead of the org's custom theme'. Below these is an 'App Launcher Preview' showing a blue square with 'IS' and the text 'Inside Sales'.

The Pages list shows all the active pages associated with the app and all Home pages assigned to a profile.

- Note:** Editing Lightning apps installed from a managed package hasn't changed. When you edit a managed Lightning app, you still customize its settings with the Edit App wizard.

SEE ALSO:

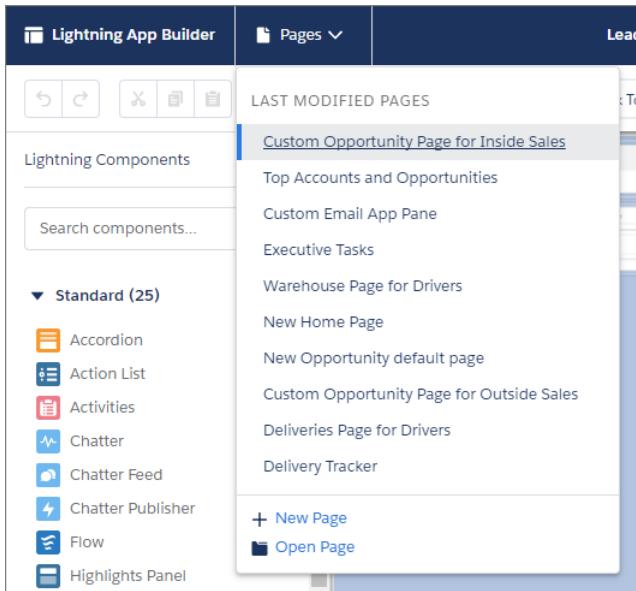
[Manage Your Lightning Pages Inside the Lightning App Builder](#)

Manage Your Lightning Pages Inside the Lightning App Builder

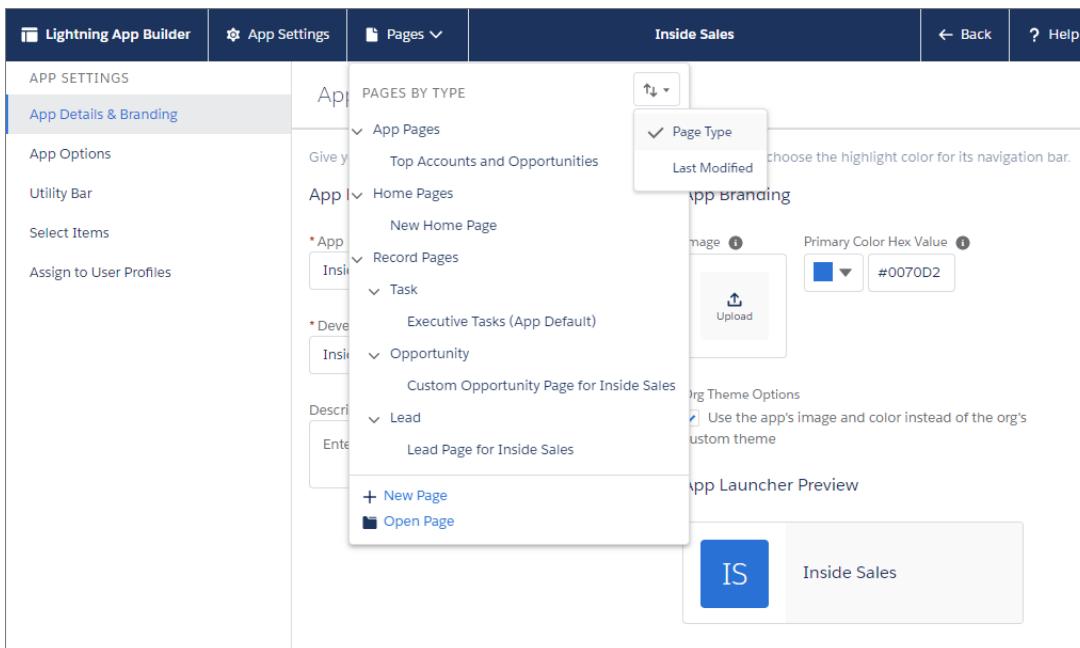
The list of Lightning pages in Setup is no longer the only way you can view and manage Lightning pages in your org. We added a page menu inside the Lightning App Builder so that you can work on Lightning pages without switching back and forth to Setup. You can even create pages right from the list.

The Pages list displays in two different ways, depending on your context.

When you open a Lightning page from the Lightning App Builder list page in Setup, or by using the Edit Page option from the Setup menu, the Pages menu shows the last 10 modified pages.



When you edit a Lightning app, the Pages menu shows all active Lightning pages associated with the current app, including record and app pages assigned to the app, and all Home pages that are assigned to a profile. You can sort the list either by page type or last modified.

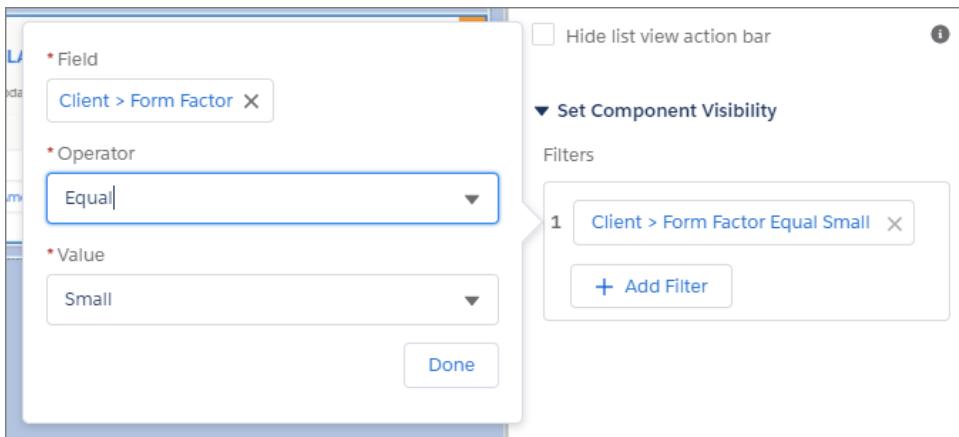


Click a Lightning page in the list to open, edit, and save it, all in the context of the app you're working in, while never leaving the Lightning App Builder. At the bottom of the page list, you can create pages or open existing pages, even ones not associated with the app.

Make Your Lightning App and Home Pages Dynamic

Setting visibility conditions for components isn't limited to record pages anymore. Now you can set visibility rules on Lightning app and Home pages too.

App and Home pages aren't associated with an object, so the filters you can use are limited to other contexts, such as User or Client. But that doesn't mean that they're less powerful. For instance, with a filter using the Client context you can set a component to display exclusively in one experience or the other, such as when an app page is viewed on a phone or a desktop.



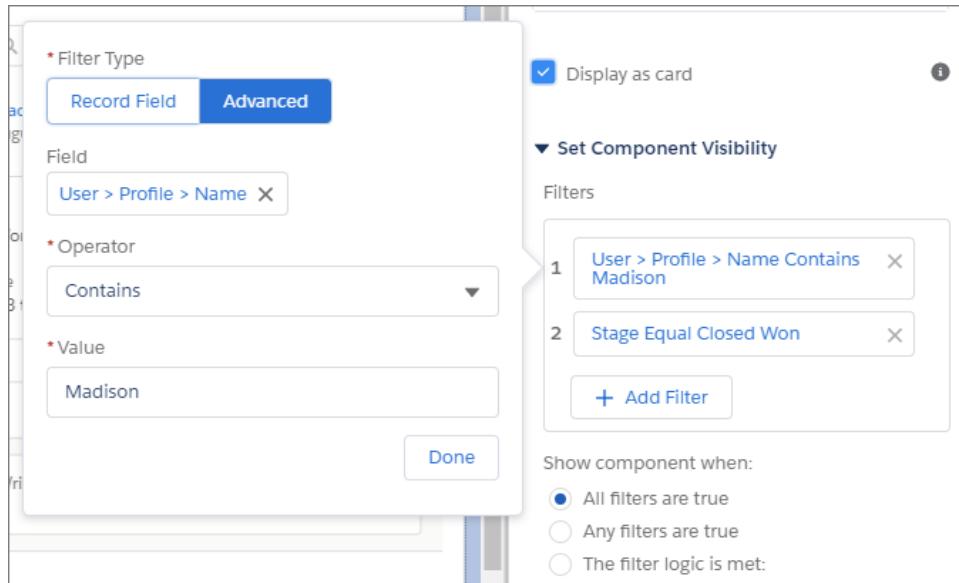
Filters are also available in Lightning for Outlook and Lightning for Gmail. For each component in the email application pane, you can set whether the component appears when a rep is reading an email or viewing an event, or when a rep is composing an email or editing an event.

Component visibility filters are supported for standard components, custom components, and components from AppExchange. If you don't define a filter, the component displays on the Lightning page as usual. When you define one or more filters and set the filter logic for a component, the component is hidden until the filter logic criteria are met.

Include Related Fields and Other Objects in Component Visibility Rules

Previously, you could only define component visibility rules on Lightning record pages based on the fields directly on the record. Now you can create filters that are much more robust.

For example, on record pages, you can select fields from the record by clicking **Record Field**. Or click **Advanced** to expand your field selections to related fields, related objects, or fields from other objects such as Client and User.



See Assigned Apps on App Page Detail Pages

We added a new related list to the detail page for Lightning app pages. When you view your page details, you can see a list of all Lightning apps that include that page.

The screenshot shows the 'Lightning Page Detail' screen for a page named 'Top_Accounts_and_Opportunities'. The 'Assignments By App' section is highlighted with a red box. It lists two apps: 'Inside Sales' and 'Sales'.

App
Inside Sales
Sales

The Assignments By App list shows which apps you've assigned the app page to by either activating it in the Lightning App Builder or assigning the page's custom tab in the app's settings.

Organize Components into Collapsible Sections

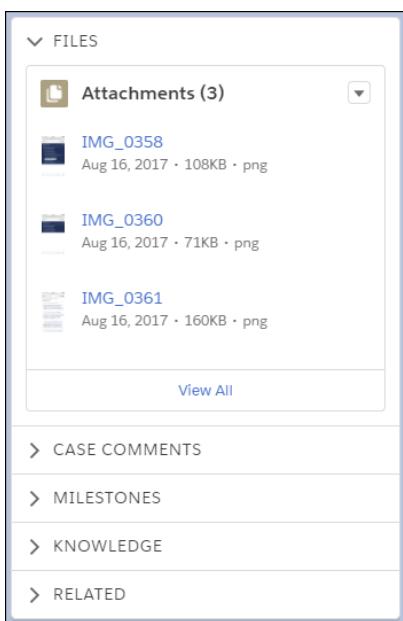
Manage screen clutter by grouping components into collapsible sections. The new Accordion component is like the Tabs component, but vertically stacked. You can use the Accordion component on all record pages. This feature is new in Lightning Experience.

You can have up to 25 sections, but we recommend no more than 10. You can also embed multiple components in each section, each with its own heading.

Here's what the component looks like in the Lightning App Builder.

The screenshot shows the 'Accordion' component configuration in the Lightning App Builder. The left sidebar lists components: FILES, CUSTOM LABEL, MILESTONES, KNOWLEDGE, and RELATED. The right panel shows the 'Accordion' configuration with sections: Files, Custom Label, Milestones, Knowledge, and Related. A note says 'Each section can hold one or more components. Only one section is expanded at a time.' A 'Default Expanded Section' dropdown is set to 'Files'. A 'Set Component Visibility' section is also visible.

Here's what your users see.



SEE ALSO:

[Reduce the Noise on Your Console Pages with Collapsible Sections](#)

Create Pinned Region Pages for Your Console Apps

A pinned region remains displayed as you navigate to subtabs in a Lightning console app. Three new page templates are available for Lightning console apps to make it easier for console users to work with records. This feature is new in Lightning Experience.

The new templates also work in apps with standard navigation. However, we recommend that you use a non-pinned region template in standard apps because they don't benefit from a pinned region.

Pinned region templates are available only for record pages. To create a pinned region page, look for these templates in the Lightning App Builder.

- Console: Pinned Header
- Console: Pinned Header and Left Sidebar
- Console: Pinned Left Sidebar

Create a New Lightning Page

CHOOSE PAGE TEMPLATE CLONE SALESFORCE DEFAULT PAGE

- Console: Pinned Header
- Console: Pinned Header and Left Sidebar**
- Console: Pinned Left Sidebar
- Header and Left Sidebar
- Header and One Column
- Header and Right Sidebar
- Header and Three Columns
- Header, Subheader, Left Sidebar
- Header, Subheader, Right Sidebar

Full-width header and two sidebars with fixed proportional widths. In Lightning console apps, the header and left sidebar stay pinned for subtabs.

Back Finish

When working in the Lightning App Builder, you add components to pinned regions the same way by dragging what you want to the page. A pin icon indicates that a region can be pinned.

Sample Case: Widget breaks after restarting

00001009 Sample Subtab

Add Component(s) to Pinned Region Here

Contact Details

Name	Jon Amos
Title	Sales Manager
Email	jon_amos@acme.com
Phone	(555) 555-1234



Note: Pinned regions don't support theming. For example, if you use custom theming to brand your app with the color green, the green theming doesn't appear in the pinned regions.

SEE ALSO:

[Add Pinned Regions to Your Console Pages and Never Toggle Tabs Again](#)

Display Paused Flow Interviews on Home Pages

Use the new Paused Flow Interviews component to let your users resume interviews in Lightning Experience. A flow interview is a running instance of a flow. The component displays up to five interviews that the user owns or that have been shared with the user. This component is supported only on Home pages. This feature is new in Lightning Experience.

SEE ALSO:

[Resume Paused Flow Interviews from Lightning Experience](#)

EDITIONS

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions

Gather Feedback from Users with the Surveys Component

Use the Surveys component to embed an active survey in your Lightning page. This component is available for all types of Lightning pages.

EDITIONS

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions

Use F6 to Switch Lightning App Builder Panel Focus

Now you need only one key—F6—to switch focus between panels in the Lightning App Builder. Using Alt+1 through Alt+5 is no longer supported.

Flow: Lightning Components in Screens, Stages, Autolaunch in Lightning Console Apps

With Lightning components, you can build flow screens that look and behave however you want. Use stages to indicate where in the flow a user is at any given time. Then rig that flow up in your Lightning console app so that it autolaunches in a subtab. These changes apply to both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions

IN THIS SECTION:

[Flow Design: Richer Screens with Lightning Components and Stages](#)

Build the flow of your dreams with Lightning components in your screens. While you're at it, configure parts of the flow into stages and use a Lightning component to indicate which stage in the flow a user is at. And do more in the browser and less in the server with local actions. These changes apply to both Lightning Experience and Salesforce Classic.

[Flow Distribution: Subtabs in Console Apps, Object-Specific Actions, and Dynamic Apex](#)

With the new Lightning Flow for Service pilot, the appropriate flow autolaunches as a subtab when an agent takes a call. Flow actions let you access flows from a record with the click of a button. If you're programmatically inclined, you can now invoke flows dynamically from Apex. These changes apply to both Lightning Experience and Salesforce Classic.

[Paused Flow Interviews: Sharing, Record Association, Resume from Lightning Experience](#)

Users are no longer restricted to resuming the flow interviews that they paused. Interview sharing lets a person step in where someone else left off. Also, you can relate interviews to records, and users can now resume their interviews from Lightning Experience. These changes apply to both Lightning Experience and Salesforce Classic.

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IN THIS SECTION:

[Build Richer Flow Screens with Lightning Components](#)

Now that flow screens have Lightning components, the world is your oyster—you can build flow screens that look and behave any way that you want. This feature is new in both Lightning Experience and Salesforce Classic. However, it only works for Lightning flow runtime.

[Override the Default Header and Footer on Flow Screens](#)

If you've been wanting to remove the default header on a flow screen or customize the navigation buttons at the bottom, your day has arrived. This feature is new in both Lightning Experience and Salesforce Classic. However, it only works for Lightning flow runtime.

[Track Progress Through a Flow with Stages \(Beta\)](#)

Indicate a user's point in the flow using the new stage resource and two new system variables: `{ !$Flow.ActiveStages }` and `{ !$Flow.CurrentStage }`. For example, indicate where in a purchasing flow the user is with breadcrumbs or a progress indicator. This feature is new in both Lightning Experience and Salesforce Classic.

[Call JavaScript Directly from Your Flow with Local Actions \(Pilot\)](#)

Pull data from an on-premises or private cloud database directly into your flow without going through the Salesforce server. Or do things directly in the browser, such as open a particular URL or confirm that a record was created with a toast message. With flow local actions, you can call the JavaScript controller of an associated Lightning component, which means you can integrate directly with the browser. This feature is new in both Lightning Experience and Salesforce Classic. However, it's supported only in Lightning flow runtime.

[Upload Files Directly from a Flow](#)

With just a few clicks, your users can attach files during a flow. Just add the File Upload component to your flow screens using a Lightning component field. This feature is new in Lightning Experience. However, it works only for flows that use Lightning runtime.

[Some Flow Types Have New Labels](#)

To alleviate confusion, we updated the label for the Flow type to Screen Flow. That means we can avoid saying "a flow of type Flow." We also cleaned up the names of the types for field service. Field Service Mobile is now called Field Service Mobile Flow, and Field Service Web has changed to Field Service Snap-In Flow.

Build Richer Flow Screens with Lightning Components

Now that flow screens have Lightning components, the world is your oyster—you can build flow screens that look and behave any way that you want. This feature is new in both Lightning Experience and Salesforce Classic. However, it only works for Lightning flow runtime.

-  **Note:** To use Lightning components, enable My Domain in your org.

What can you do with Lightning components in flow screens? Here are just a few ideas.

- Give users more intuitive navigation options.
- Add custom styling to the entire screen.
- Build dynamic screens with filtered fields.

As long as a component implements the new `lightning:availableForFlowScreens` interface and has a corresponding design resource, it's available as a Lightning component screen field.



Example: This example uses Lightning components from top to bottom to customize the header, agent script, display data from the customer's record, and actions in the footer.

Verify Information

Hi Ms. Schultz, thank you for contacting customer support.

For verification purposes, may I have your full name and date of birth?

Customer Information

Full Name	Date of Birth
Riley Schultz	December 11, 1976

[Additional Verification](#) [Confirm](#)

SEE ALSO:

- [Override the Default Header and Footer on Flow Screens](#)
- [Upload Files Directly from a Flow](#)
- [Cloud Flow Designer Guide: Flow Screen Element](#)
- [Lightning Components Developer Guide: Use Lightning Components in Flow Screens](#)
- [New and Changed Lightning Interfaces](#)
- [Metadata API](#)

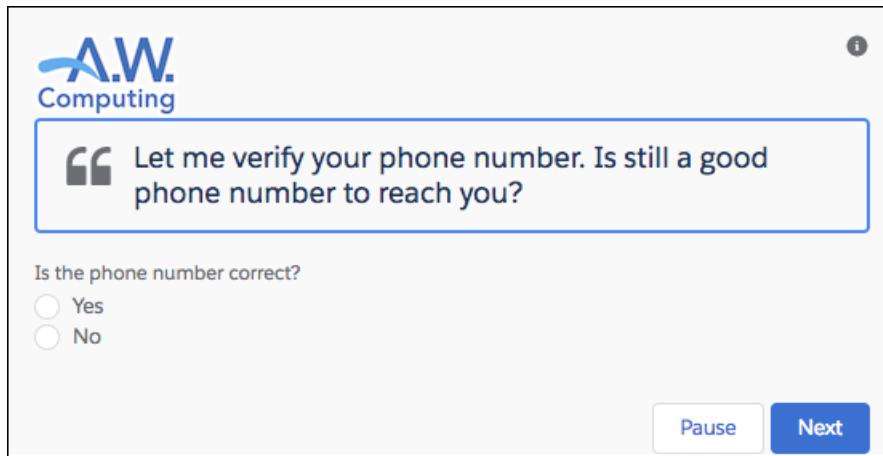
Override the Default Header and Footer on Flow Screens

If you've been wanting to remove the default header on a flow screen or customize the navigation buttons at the bottom, your day has arrived. This feature is new in both Lightning Experience and Salesforce Classic. However, it only works for Lightning flow runtime.

To remove the header and footer, deselect **Show Header** and **Show Footer** when you configure a flow screen. If you remove the footer, the screen's navigation buttons don't appear. Make sure to add a custom Lightning component that lets users navigate from the screen to another one.



Example: Behind the scenes, custom Lightning components in this flow screen control the header's look and feel and display the Pause button on the right side of the footer.



SEE ALSO:

[Build Richer Flow Screens with Lightning Components](#)

[Lightning Components Developer Guide: Use Lightning Components in Flow Screens](#)

[Metadata API](#)

Track Progress Through a Flow with Stages (Beta)

Indicate a user's point in the flow using the new stage resource and two new system variables: `{ !$Flow.ActiveStages }` and `{ !$Flow.CurrentStage }`. For example, indicate where in a purchasing flow the user is with breadcrumbs or a progress indicator. This feature is new in both Lightning Experience and Salesforce Classic.

 **Note:** This release contains a beta version of flow stages that is production quality but has known limitations. To provide feedback and suggestions, go to [IdeaExchange](#).

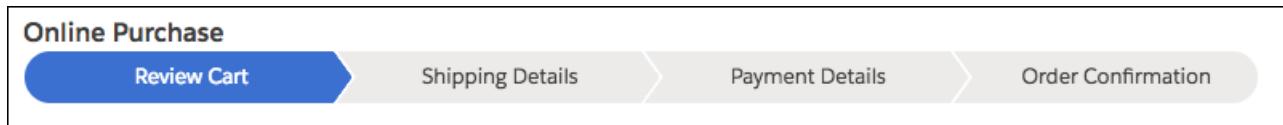
Under the Resources tab, define the stages for every permutation of your flow. Then, throughout the flow, identify which stages are relevant to the user by assigning values to the stage system variables.

- `$Flow.ActiveStages` identifies the stages that are relevant to the flow's current path.
- `$Flow.CurrentStage` identifies at which stage the flow is. Make sure that the selected stage is included in `$Flow.ActiveStages`.

 **Tip:** The standard flow runtime doesn't represent a flow's stages by default. However, you can build your own component that does and add it to your flow by using Lightning component screen fields. We recommend using a lightning:progressindicator component.

 **Example:** The Online Purchase flow includes stages for users to review their cart, enter shipping details, enter payment details, and confirm their order. The stages display at runtime using a custom Lightning component.

At this point, `$Flow.ActiveStages` contains the Review Cart, Shipping Details, Payment Details, and Order Confirmation stages, and `$Flow.CurrentStage` is set to Review Cart.



SEE ALSO:

- [Build Richer Flow Screens with Lightning Components](#)
- [Cloud Flow Designer Guide: Show Users Progress Through a Flow with Stages](#)

Call JavaScript Directly from Your Flow with Local Actions (Pilot)

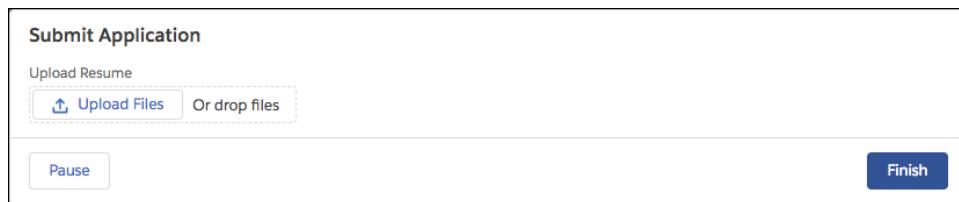
Pull data from an on-premises or private cloud database directly into your flow without going through the Salesforce server. Or do things directly in the browser, such as open a particular URL or confirm that a record was created with a toast message. With flow local actions, you can call the JavaScript controller of an associated Lightning component, which means you can integrate directly with the browser. This feature is new in both Lightning Experience and Salesforce Classic. However, it's supported only in Lightning flow runtime.

 **Note:** We provide Flow Local Actions to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Flow Local Actions isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Flow Local Actions in the [IdeaExchange](#).

When you create a Lightning component that implements the `flowruntime:availableForFlowLocalActions` interface, the component appears in the Cloud Flow Designer's palette. When a flow executes a local action, it calls the `invoke` method in the component's JavaScript controller. To return control to the flow, in the `invoke` method use the callback function that's provided by the interface.

Upload Files Directly from a Flow

With just a few clicks, your users can attach files during a flow. Just add the File Upload component to your flow screens using a Lightning component field. This feature is new in Lightning Experience. However, it works only for flows that use Lightning runtime.



To add the File Upload component to a flow screen, add a Lightning component field to the screen. For Lightning Component, select **forceContent:fileUpload**. Then configure the attributes.

SEE ALSO:

- [Cloud Flow Designer Guide: Flow Screen Component: File Upload](#)
- [IdeaExchange: New Cloud Flow Designer Element - Attach File](#)

Some Flow Types Have New Labels

To alleviate confusion, we updated the label for the Flow type to Screen Flow. That means we can avoid saying “a flow of type Flow.” We also cleaned up the names of the types for field service. Field Service Mobile is now called Field Service Mobile Flow, and Field Service Web has changed to Field Service Snap-In Flow.

Flow Distribution: Subtabs in Console Apps, Object-Specific Actions, and Dynamic Apex

With the new Lightning Flow for Service pilot, the appropriate flow autolaunches as a subtab when an agent takes a call. Flow actions let you access flows from a record with the click of a button. If you’re programmatically inclined, you can now invoke flows dynamically from Apex. These changes apply to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Launch Flows as Subtabs in Lightning Console Apps \(Pilot\)](#)

Guide your users through multi-step processes with Lightning Flow for Service. Associate records to flows using Salesforce automation tools. When records are opened in a console app and there’s an associated flow, the flow is autolaunched as a subtab. This feature is new in Lightning Experience.

[Launch a Flow from an Object-Specific Action \(Generally Available\)](#)

Add flows to the action menu on your Lightning pages without hunting down the flow’s URL. When you create a flow action, you can pick from a list of available flows rather than enter the flow URL manually. This feature is available in Lightning Experience and all versions of the Salesforce app.

[Start Flows Dynamically from Apex](#)

Previously, you could start a flow interview from Apex, but you had to hardcode the flow name in your method. Which means for every flow, you had to write a different method. With `createInterview()`, you can write one method to start an interview for any flow.

[Check Which Flow Translations Are Out of Date](#)

Previously, the Out of Date column in Translation Workbench didn’t apply to most flow translations. Now when you change a flow that has translations, the affected translations are marked out of date in the UI and in bilingual export files. Your translators can review the specific label that changed rather than retranslating the entire flow.

[Execute All Autolaunched Flow Interviews When Invoked in Bulk \(Critical Update\)](#)

When flow interviews are invoked in bulk, they are now all executed. Previously, when multiple flow interviews were invoked in bulk, only the first interview was started and executed; the remaining interviews were discarded.

Launch Flows as Subtabs in Lightning Console Apps (Pilot)

Guide your users through multi-step processes with Lightning Flow for Service. Associate records to flows using Salesforce automation tools. When records are opened in a console app and there’s an associated flow, the flow is autolaunched as a subtab. This feature is new in Lightning Experience.

 **Note:** We provide Lightning Flow for Service to selected customers through a pilot program that requires agreement to specific terms and conditions. Lightning Flow for Service is subject to change and isn’t generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can’t guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

To join this pilot, contact your Salesforce Account Executive or Success Manager.

EDITIONS

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions with
Service Cloud

For more information, see [Guide Your Agents with Lightning Flow for Service \(Pilot\)](#).

Launch a Flow from an Object-Specific Action (Generally Available)

Add flows to the action menu on your Lightning pages without hunting down the flow's URL. When you create a flow action, you can pick from a list of available flows rather than enter the flow URL manually. This feature is available in Lightning Experience and all versions of the Salesforce app.

Flow actions can't call just any flow in your org. To work as a flow action, a flow must be active and have screens. Flow actions also can't be global actions.

To create a flow action, select **Flow** from the Action Type dropdown when you create an object-specific action. You can add flow actions to an object's page layout using the page layout editor. To see your org's flow actions in the page layout editor, check out the Mobile & Lightning Actions category in the palette.

 **Tip:** If your flow needs the ID of the record that it's operating on, don't worry! Salesforce sends the record ID to the flow as long as you have a Text input variable called `recordId`.

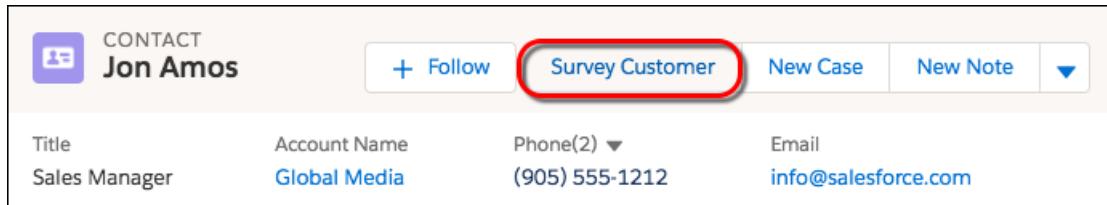
Changes Since Winter '18

- A flow action's screen-level help text is no longer available for feed-based page layouts.
- Flow actions are now fully supported in packages, change sets, and other deployment tools.
- Flow actions now support Field Service Mobile flows (Beta).

 **Note:** This release contains a beta version of Field Service Mobile flow actions that is production quality but has known limitations. To access this feature, contact Salesforce. To provide feedback and suggestions, go to [IdeaExchange](#).

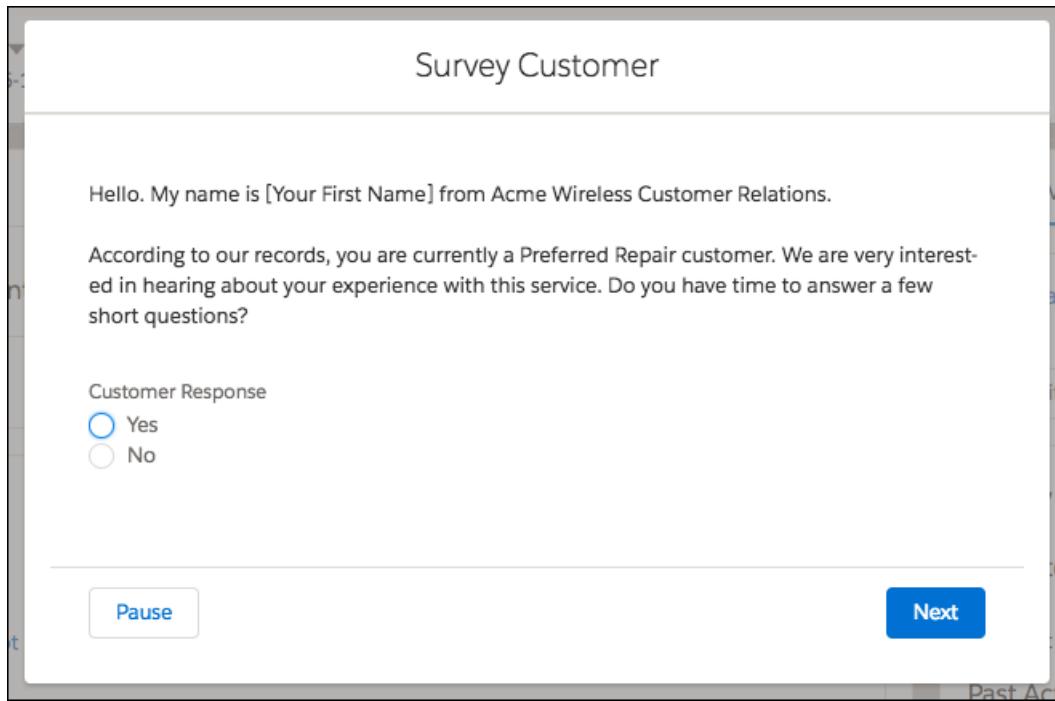
 **Example:** Let's say you create a flow action for your Survey Customer flow and add it to the contact page layout.

Here's how that action appears for contacts in Lightning Experience.



The screenshot shows a contact record for "Jon Amos". At the top, there's a navigation bar with buttons for "+ Follow", "Survey Customer" (which is circled in red), "New Case", and "New Note". Below the navigation bar, there's a table with contact details: Title ("Sales Manager"), Account Name ("Global Media"), Phone number ("(905) 555-1212"), and Email ("info@salesforce.com").

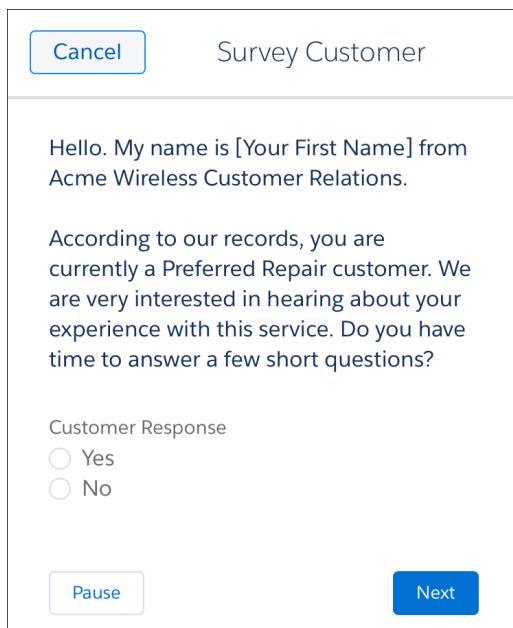
Here's how that flow appears when a user clicks the Survey Customer flow action.



Here's how that action appears in the Salesforce app action bar for contacts.



Here's how that flow appears in the Salesforce app when a user taps the Survey Customer flow action.



SEE ALSO:

[Cloud Flow Designer Guide: Create a Flow Action](#)

Start Flows Dynamically from Apex

Previously, you could start a flow interview from Apex, but you had to hardcode the flow name in your method. Which means for every flow, you had to write a different method. With `createInterview()`, you can write one method to start an interview for any flow.

 **Example:** This function expects a flow name and a map of values for the flow's input variables. It passes those values into an Interview object by using `createInterview()`, and then it starts the interview.

```
public void callFlow(String flowName, Map <String, Object> inputs) {
    Flow.Interview myFlow = Flow.Interview.createInterview(flowName, inputs);
    myFlow.start();
}
```

SEE ALSO:

[Apex Developer Guide: Interview Class](#)

[IdeaExchange: Dynamically Obtain a Flow Interview Instance from Within Apex](#)

Check Which Flow Translations Are Out of Date

Previously, the Out of Date column in Translation Workbench didn't apply to most flow translations. Now when you change a flow that has translations, the affected translations are marked out of date in the UI and in bilingual export files. Your translators can review the specific label that changed rather than retranslating the entire flow.

 **Example:** Your users have been confused by the "Assign other accounts to" field in your Reassign Accounts flow. So you update the field to be more specific. The new label is "Assign warm and cold accounts to."

In Translation Workbench, the translation for the new label is marked out of date, so you request an updated translation only for that field.

Master Field Label ▾	Field Label Translation	Type	Out of Date
Assign hot accounts to	Hot Accounts zuordnen	String	<input type="checkbox"/>
Assign warm and cold accounts to	Andere Accounts zuordnen	String	<input checked="" type="checkbox"/>
User whose accounts need to be reassigned	Benutzer, dessen Konten neu zugewiesen werden müssen	String	<input type="checkbox"/>
1-3 of 3	◀ ◀ Previous Next ▶ ▶	Page 1 of 1	

Execute All Autolaunched Flow Interviews When Invoked in Bulk (Critical Update)

When flow interviews are invoked in bulk, they are now all executed. Previously, when multiple flow interviews were invoked in bulk, only the first interview was started and executed; the remaining interviews were discarded.

You can invoke multiple interviews for an autolaunched flow simultaneously by:

- Uploading bulk records that start a process, which then executes a flow action
- Passing multiple input maps in the request for the Invocable Actions resource in the REST API

Because the interviews run in one transaction, your process or API call could hit limits that it wasn't reaching before, such as `Maximum number of duplicated updates in one batch`. If more than 12 duplicate updates are tried, the entire transaction is rolled back. If your implementation hits a limit, the flow error email includes error messages for that limit.



Example: Let's say you have a process that starts when a case is created or edited. That process always invokes an autolaunched flow that updates the associated account's description. You upload 20 new cases, which are all associated with the Acme Wireless account.

Previously, Salesforce started only one interview of the autolaunched flow. The description for Acme Wireless is updated once, and no errors occurred.

With this critical update, an interview of the autolaunched flow for each case is started. Each interview updates the same Acme Wireless record, and a given transaction can execute duplicate updates 12 times. So the transaction fails in the 13th interview and rolls back.

Test This Critical Update

We recommend testing the critical update in a sandbox. If you must work in your production org, do so during off-peak hours.

1. Identify all processes that include a flow action and all integrations that call an autolaunched flow through the Invocable Actions resource in the REST API.
2. Review all the implementations for potential impact. If your implementation is optimized for one interview being executed per batch of records, revisit your implementation design.
3. Update your implementations so that they don't hit Salesforce limits. For example, if a flow is called from a process, make sure that it doesn't update the same record as other interviews in the batch.
4. From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
5. For Execute All Autolaunched Flow Interviews When Invoked in Bulk, click **Activate**. Then test your implementations to make sure that they're working as you expect.

Paused Flow Interviews: Sharing, Record Association, Resume from Lightning Experience

Users are no longer restricted to resuming the flow interviews that they paused. Interview sharing lets a person step in where someone else left off. Also, you can relate interviews to records, and users can now resume their interviews from Lightning Experience. These changes apply to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Resume Paused Interviews That Other Users Own](#)

The person who starts an interview isn't always the person who should finish it. Maybe a community user starts a flow but an agent must finish it, or maybe one department starts a flow and another one finishes it. No matter what your use case is, we've got you covered with interview sharing. Users can now resume any interview that they have edit access to not just the ones they own. Interview sharing is enabled by default. Previously, you could create sharing rules only from the API, and only the owner or a flow admin could resume an interview.

[Resume Paused Flow Interviews from Lightning Experience](#)

Gone are the days when you had to use Salesforce Classic or the Salesforce app to resume interviews that you paused. With the new Paused Flow Interviews component in the Lightning App Builder, Lightning Experience users can resume interviews directly from the Home page. This change applies to Lightning Experience only.

[Associate Paused Flow Interviews with a Record](#)

Get a single view of all interviews associated with a given customer, case, or other record. When a user pauses an interview or an interview executes a Wait element, the interview is associated with the record through the FlowRecordRelation object.

[Track More Information About Paused Flow Interviews](#)

Get more information about your paused interviews, such as whether an interview contains personal data. Build a custom object that references the interview's GUID, a unique identifier. For instance, if a customer asks to be forgotten, you need to delete all references to the customer's personal data, including data in paused flow interviews. This feature is new in both Lightning Experience and Salesforce Classic.

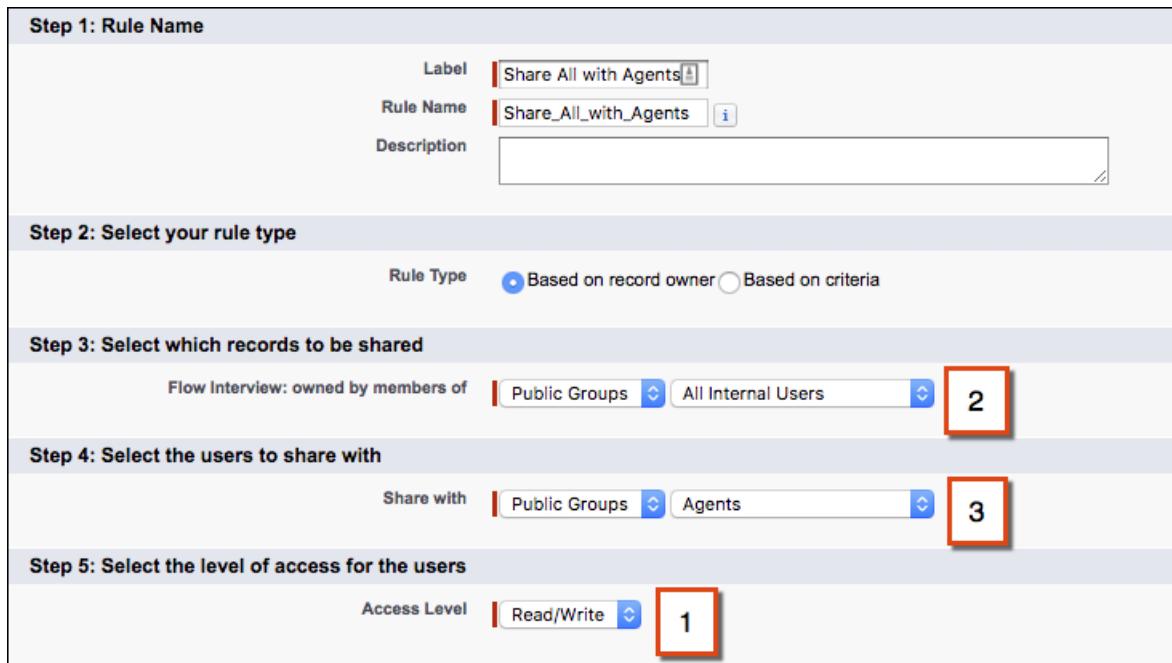
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The default sharing model for interviews is Private, which means that users inherit edit access from users lower in the role hierarchy. If your org uses a role hierarchy, users can resume all interviews that users lower in the hierarchy own or have edit access to. To restrict who can resume paused interviews, go to your org's Process Automation settings in Setup and disable **Let users resume shared flow interviews**. When this setting is disabled, only the interview owner or flow admin who has view access can resume the interview.

 **Example:** To let all agents in your org resume any interview:

1. Add all agents to the Agents public group.
2. For Flow Interview, leave the organization-wide default set to Private.
3. In a flow interview sharing rule, give read/write access (1) for interviews owned by internal users (2) to the Agents public group (3).



Step 1: Rule Name

Label: Share All with Agents
Rule Name: Share_All_with_Agents
Description:

Step 2: Select your rule type

Rule Type: Based on record owner

Step 3: Select which records to be shared

Flow Interview: owned by members of: Public Groups, All Internal Users

Step 4: Select the users to share with

Share with: Public Groups, Agents

Step 5: Select the level of access for the users

Access Level: Read/Write

SEE ALSO:

[Associate Paused Flow Interviews with a Record](#)

[Cloud Flow Designer Guide: Prepare Your Org for Paused Flow Interviews](#)

Resume Paused Flow Interviews from Lightning Experience

Gone are the days when you had to use Salesforce Classic or the Salesforce app to resume interviews that you paused. With the new Paused Flow Interviews component in the Lightning App Builder, Lightning Experience users can resume interviews directly from the Home page. This change applies to Lightning Experience only.

The Paused Flow Interviews component is supported only on Home pages. Edit the appropriate Home pages in the Lightning App Builder to add the component.



SEE ALSO:

[Cloud Flow Designer Guide: Prepare Your Org for Paused Flow Interviews](#)

Associate Paused Flow Interviews with a Record

Get a single view of all interviews associated with a given customer, case, or other record. When a user pauses an interview or an interview executes a Wait element, the interview is associated with the record through the FlowRecordRelation object.

To associate your flow with a record, set the `{ !$Flow.CurrentRecord }` system variable to a valid record ID in an Assignment element.

To display all interviews associated with a given record, create a custom Lightning component and add the component to the record page.



Tip: Customize your org's sharing model for the FlowInterview object so that the appropriate users can resume the interviews associated with a record, not just the interview owner.



Example: This SOQL query returns a list of interview IDs that are associated with a particular contact.

```
SELECT ParentId FROM FlowRecordRelation WHERE RelatedRecordId = '003R0000001f5cnIAA'
```

SEE ALSO:

[Build Richer Flow Screens with Lightning Components](#)

[Resume Paused Interviews That Other Users Own](#)

[Cloud Flow Designer Guide: Prepare Your Org for Paused Flow Interviews](#)

Track More Information About Paused Flow Interviews

Get more information about your paused interviews, such as whether an interview contains personal data. Build a custom object that references the interview's GUID, a unique identifier. For instance, if a customer asks to be forgotten, you need to delete all references to the customer's personal data, including data in paused flow interviews. This feature is new in both Lightning Experience and Salesforce Classic.

To access an interview's unique identifier in your flow, reference the new `$Flow.InterviewGuid` system variable.



Note: When an interview executes a Wait element, or a user pauses it, all the interview data is serialized and saved to the database as a Paused Flow Interview record. When the interview is resumed, the corresponding record is deleted.



Example: To identify which paused interviews include personal data for a contact, lead, or user, build a custom object to track the interview's GUID and the affected contact, lead, or user. When an interview references personal data, such as a lead's email or credit card number, create a record of the custom object using the lead's ID and `{ !$Flow.InterviewGuid }`. Before the final screen, delete all records of the custom object referencing the interview's GUID. That way, the custom object tracks only interviews that are saved to the database.

When a customer asks to be forgotten, create a report that lists all the custom object records where LeadId matches the customer's record. Then for each custom object record, delete the flow interview that corresponds to the provided GUID.

SEE ALSO:

[Cloud Flow Designer Guide: System Variables in Flows](#)

Fields and Picklists: Time Field Type Beta and Picklist Conversion Enhancement for Record Types

All editions get the time custom field beta. Picklist value settings for record types are preserved when you convert the field to a multi-select picklist.

EDITIONS

Available in: **All** Editions

IN THIS SECTION:

[Track Time with the Time Field Type \(Beta\)](#)

The time field type, which was a private beta release in Winter '18, is now a public beta release. Use this custom field type to track time that is not specific to a single date, such as preferred contact hours. The time field type is useful for time management, event planning, and project management. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Keep Your Record Type Value Settings When You Convert a Custom Picklist to a Custom Multi-Select Picklist](#)

We enhanced the conversion of a custom picklist field to a custom multi-select picklist field to preserve an associated record type's value settings for the field.

[New Formula Functions](#)

We've added several date, math, and advanced formula functions.

SEE ALSO:

[Get the Same Behavior for Global Value Sets and Standard Value Sets in Managed Package Upgrades](#)

Track Time with the Time Field Type (Beta)

The time field type, which was a private beta release in Winter '18, is now a public beta release. Use this custom field type to track time that is not specific to a single date, such as preferred contact hours. The time field type is useful for time management, event planning, and project management. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.



Note: This release contains a beta version of the time custom field type, which means it's a high-quality feature with known limitations. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for the time field type in the [Custom Time Field Trailblazer Community group](#).

The time field type is like a timestamp minus the date. You can select the time field type when you create a custom field.

To support using time in formulas, this beta release includes the `TIMEVALUE` and `TIMENOW` functions, as well as new `HOUR`, `MINUTE`, `SECOND`, and `MILLISECOND` functions.

This public beta includes the following improvements on the private beta version.

- Time fields are now displayed in time format in reports.
- Adding or subtracting time values uses milliseconds for more precision (previously these operations used hour increments).
- You can convert time values to text or numbers.

Be aware of the following limitations when using a time field type. The time field:

- Cannot be added to records in automated flows created in Cloud Flow Designer or processes designed in Process Builder.
- Is not supported in Schema Builder.
- Does not have an Aura UI component.
- Does not support Lightning UI components. If you declare a component with input type `"time"`, then you receive a parsing error at runtime.
- Cannot be converted to the text or number types.
- Doesn't support the creation of custom indexes for SOQL queries.
- Is not available for standard lookup relationships in external objects.
- Requires the entire time value, including milliseconds, for filtering in reports. For example, use `CustomTimeOnly equals 10:00:00.000` to filter a report for 10:00 AM.

SEE ALSO:

[Salesforce Help: Time Custom Field \(Beta\)](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Custom Time Field](#)

Keep Your Record Type Value Settings When You Convert a Custom Picklist to a Custom Multi-Select Picklist

We enhanced the conversion of a custom picklist field to a custom multi-select picklist field to preserve an associated record type's value settings for the field.

When you work with record types and convert a field from a custom picklist to a custom multi-select picklist, your record type value settings for the picklist field apply to the new custom multi-select picklist.

New Formula Functions

We've added several date, math, and advanced formula functions.

The following formula functions have been added.

ADDMONTHS

Returns the date that is the indicated number of months before or after a specified date. If the resulting month has fewer days than the start month, then the function returns the last day of the resulting month. Otherwise, the result has the same day component as the specified date.

CURRENCYRATE

Returns the conversion rate to the corporate currency for the given currency ISO code. If the currency is invalid, returns 1.0.

MCEILING

Rounds a number up to the nearest integer, towards zero if negative.

MFLOOR

Rounds a number down to the nearest integer, away from zero if negative.

WEEKDAY

Returns the day of the week for the given date, using 1 for Sunday, 2 for Monday, through 7 for Saturday.

SEE ALSO:

[Formula Operators and Functions](#)

User Setup: Self-Deactivating External Accounts, New Location for Enhanced Profile Settings

Let external users deactivate their own accounts when they want on the User Management Settings page. Conveniently manage enhanced profile list views and the enhanced profile user interface options here as well. Formerly these options resided on the User Interface page. This change applies to both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Enable External Users to Self-Deactivate](#)

Let external Community and Chatter users deactivate their own accounts. Allowing self-deactivation can comply with certain regulatory requirements. When external users deactivate their accounts, the results are identical to an administrator-initiated deactivation. After you enable self-deactivation, you can use programmatic or declarative tools to enable users to deactivate their accounts.

[Access Enhanced Profile Features in User Management Settings Node](#)

We moved the settings to enable the enhanced profile user interface and enhanced profile list views to the User Management Settings page. These options previously resided on the User Interface page. Now it's more convenient to administer user-related enablements because the options are grouped together on the same page.

SEE ALSO:

[Deactivate \(Delete\) Users](#)

Enable External Users to Self-Deactivate

Let external Community and Chatter users deactivate their own accounts. Allowing self-deactivation can comply with certain regulatory requirements. When external users deactivate their accounts, the results are identical to an administrator-initiated deactivation. After you enable self-deactivation, you can use programmatic or declarative tools to enable users to deactivate their accounts.

EDITIONS

Available in: All Editions

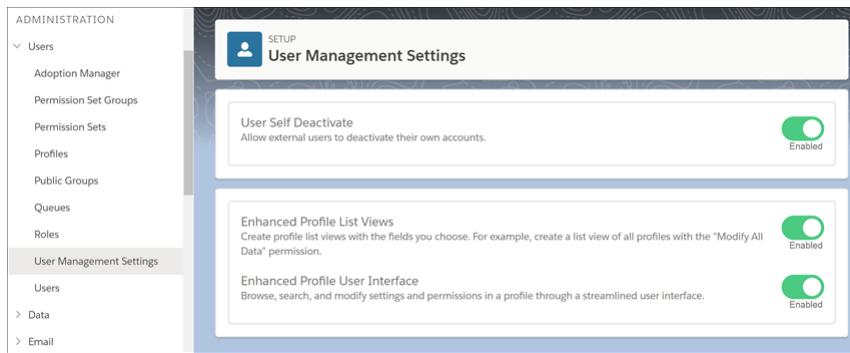
Salesforce Connect: Debugging External Object Access, Continued Pilot for Callout Event Monitoring, Metadata API Support for Compact Layouts on External Objects, and an Improved OData 2.0 Adapter for New Orgs



Example: Let's say you have a community for your customers who want to collaborate and share information about your products. A community user changes jobs and decides to deactivate the account associated with the community. Enable **User Self Deactivate**. Then create a flow that external users can run to deactivate their own accounts without the help of an administrator.

Access Enhanced Profile Features in User Management Settings Node

We moved the settings to enable the enhanced profile user interface and enhanced profile list views to the User Management Settings page. These options previously resided on the User Interface page. Now it's more convenient to administer user-related enablements because the options are grouped together on the same page.



Editions

Available in: Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Custom Profiles available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Salesforce Connect: Debugging External Object Access, Continued Pilot for Callout Event Monitoring, Metadata API Support for Compact Layouts on External Objects, and an Improved OData 2.0 Adapter for New Orgs

Use new and updated event types to troubleshoot problems accessing external object data. Try out the improved log data for tracking external object data callouts with event log files, and let us know what you think. Retrieve and deploy compact layouts for external objects. When you create a new org, you also get an improved OData 2.0 adapter.

IN THIS SECTION:

[Troubleshoot Access to External Objects with New and Updated Debug Event Types](#)

If you've encountered issues accessing Salesforce Connect external objects, perhaps you struggled to find out where things went wrong. Now debug logs include details about requests and responses that occur when the platform or a user accesses external objects via the cross-org or OData adapters for Salesforce Connect. You can quickly tell whether a problem is on the external system or your Salesforce setup. You can scrutinize the requests that your org sends to the external system and the responses and errors that the external system returns. This change applies to both Lightning Experience and Salesforce Classic.

[Track External Object Data Callouts with Event Log Files \(Pilot\)](#)

We added and updated fields to the pilot for tracking Salesforce Connect callouts to external systems. Audit the historical activity of your org's access to external object data. For each callout, you can check whether it was a query or write operation, when the call occurred, and which user accessed the external data. Don't forget to send us your feedback!

Editions

Available in: **Developer** Edition

Available for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

Salesforce Connect: Debugging External Object Access, Continued Pilot for Callout Event Monitoring, Metadata API Support for Compact Layouts on External Objects, and an Improved OData 2.0 Adapter for New Orgs

[Retrieve and Deploy Compact Layouts for External Objects](#)

You can now use Metadata API to retrieve and deploy compact layouts for external objects. This change applies to both Lightning Experience and Salesforce Classic.

[New Orgs Get an Improved OData 2.0 Adapter for Salesforce Connect](#)

To address previous issues, we improved the OData 2.0 adapter for orgs created in Spring '18. Orgs created before Spring '18 don't yet benefit from these improvements. As a result, there are behavior differences between older orgs and those created in Spring '18. These changes apply to both Lightning Experience and Salesforce Classic.

Troubleshoot Access to External Objects with New and Updated Debug Event Types

If you've encountered issues accessing Salesforce Connect external objects, perhaps you struggled to find out where things went wrong. Now debug logs include details about requests and responses that occur when the platform or a user accesses external objects via the cross-org or OData adapters for Salesforce Connect. You can quickly tell whether a problem is on the external system or your Salesforce setup. You can scrutinize the requests that your org sends to the external system and the responses and errors that the external system returns. This change applies to both Lightning Experience and Salesforce Classic.

We added these debug event types for the cross-org and OData adapters for Salesforce Connect. These events capture information about accessing external object records. The events don't include callouts that access the external system's schema, specifically when an admin clicks **Validate and Sync** or **Sync** from an external data source in Setup.

Event Name	Fields or Information Logged with the Event	Category Logged	Level Logged
XDS_RESPONSE	External data source, external object, request details, number of returned records, and system usage	Callout	INFO and above
XDS_RESPONSE_DETAIL	Truncated response from the external system, including returned records	Callout	FINE and above
XDS_RESPONSE_ERROR	Error message	Callout	ERROR and above

These debug event types are now available for the cross-org adapter for Salesforce Connect. Previously, they were available only for OData adapters. The events also now include callouts that access the external system's schema. Previously, they only included access to external object records.

Event Name	Fields or Information Logged with the Event	Category Logged	Level Logged
CALLOUT_REQUEST	External endpoint and method	Callout	INFO and above
CALLOUT_RESPONSE	Status and status code	Callout	INFO and above

USER PERMISSIONS

To view, retain, and delete debug logs:

- Manage Users

OR

View All Data

To use the Developer Console:

- API Enabled

AND

View All Data

**Note:**

- Debug logs can capture sensitive or personal data. For example, a user-entered search string is captured in the request details of the `XDS_RESPONSE` event. If the external system returns records that contain sensitive data, that data is captured in the `XDS_RESPONSE_DETAIL` event.
- Debug logs are retained for 7 days. You can delete them from the Debug Logs page in Setup or via Tooling API. If users want to opt out of having their external object access captured in debug logs, delete the trace flags for those users.
- The debugging improvements in Spring '18 don't apply to Salesforce Connect custom adapters that you create with the Apex Connector Framework. To troubleshoot external object access via custom adapters, use your preferred methods for Apex debugging.

Access debug logs from the Logs tab in the Developer Console. Or from Setup, enter *Debug Logs* in the Quick Find box.

If a user has problems accessing the data of an external object via the cross-org adapter or an OData adapter for Salesforce Connect:

1. Add a trace flag for the user with the following debug level and filters.

- Set Callouts to FINEST.
- Set all other categories to NONE.

2. Have the user attempt to access the external object data between the start and expiration date of the trace flag.
3. View the debug logs and troubleshoot.

SEE ALSO:

[Salesforce Help: Set Up Debug Logging](#)

[Salesforce Help: Debug Logs](#)

[Apex Developer Guide: Debugging Apex](#)

Track External Object Data Callouts with Event Log Files (Pilot)

We added and updated fields to the pilot for tracking Salesforce Connect callouts to external systems. Audit the historical activity of your org's access to external object data. For each callout, you can check whether it was a query or write operation, when the call occurred, and which user accessed the external data. Don't forget to send us your feedback!



Note: We provide Salesforce Connect Callout Event Monitoring to customers through a public pilot program. The pilot event types are available in orgs that use Salesforce Connect and Event Monitoring. If your org doesn't have these features, contact your Salesforce account executive to participate in the pilot. Salesforce Connect Callout Event Monitoring is subject to change and isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Salesforce Connect Callout Event Monitoring in the [Salesforce Connect group in the Trailblazer Community](#).

These events are available in the API but not in the Event Monitoring Analytics app.

External Cross-Org Callout

Callouts made via the cross-org adapter for Salesforce Connect

External Custom Apex Callout

Callouts made via custom adapters for Salesforce Connect

External OData Callout

Callouts made via the OData 2.0 and OData 4.0 adapters for Salesforce Connect

We added and updated fields for these event types.

- External Cross-Org Callout events
 - EXECUTE_MS—How long it took in milliseconds for Salesforce to prepare and execute the query. Previously, this field was reserved for future use.
 - FETCH_MS—How long it took in milliseconds to retrieve the query results from the external system. Previously, this field was reserved for future use.
 - ROWS_FETCHED—(New) Reserved for future use.
- External Custom Apex Callout events
 - EXECUTE_MS—How long it took in milliseconds for Salesforce to prepare and execute the query. Previously, this field was reserved for future use.
 - FETCH_MS—How long it took in milliseconds to retrieve the query results from the external system. Previously, this field was reserved for future use.
 - ROWS_FETCHED—(New) Number of rows fetched by the callout.
 - THROUGPUT—Number of records retrieved in 1 second. Previously, this field was reserved for future use.
- External OData Callout events
 - EXECUTE_MS—How long it took in milliseconds for Salesforce to prepare and execute the query. Previously, this field was reserved for future use.
 - FETCH_MS—How long it took in milliseconds to retrieve the query results from the external system. Previously, this field was reserved for future use.
 - NEXT_LINK—OData next link that the callout used to request a subsequent batch or page of rows. Previously, this field was reserved for future use. This field isn't supported for the OData 2.0 adapter on orgs created before Spring '18.
 - PARENT_CALLOUT—if the callout requested a subsequent page of rows, this field identifies the initial callout whose request resulted in the multi-page result set. Previously, this field was reserved for future use. This field isn't supported for the OData 2.0 adapter on orgs created before Spring '18.
 - ROWS—Total number of records in the result set. Previously, this field was reserved for future use.
 - ROWS_FETCHED—Number of rows fetched by the callout. Previously, this field was reserved for future use. This field isn't supported for the OData 2.0 adapter on orgs created before Spring '18.
 - THROUGHPUT—Number of records retrieved in 1 second. Previously, this field was reserved for future use. This field isn't supported for the OData 2.0 adapter on orgs created before Spring '18.



Example: Suppose your Salesforce org connects to an external system via an OData adapter. When you defined the external data source in Salesforce, you selected **Named Principal** for Identity Type. With the named principal, the same set of credentials is always used to access the external system from your org.

To identify the users who accessed an external object's records during a specific time period, use the log data for the External OData Callout event type. Sort by ENTITY and USER_ID to see which users accessed the external object.

In this event log file, we see that three users accessed the Product external object over 12 callouts.

EVENT_TYPE	TIMESTAMP	REQUEST_ID	ORGANIZATION_ID	USER_ID	ENTITY
ExternalODataCallout	20170330012053.7	4A13D2OIGX0eAF0FkffKqk	00D000000000123	005D0000001WIP0	Category
ExternalODataCallout	20170330012114.7	4A13E7gSW_n7V0FKeNEp-	00D000000000123	005D0000001WIP0	Category
ExternalODataCallout	20170330012121.3		00D000000000123	005D0000001WQP2	Category
ExternalODataCallout	20170330012049.8	4A13Cgvio8KKs-0FKfceaV	00D000000000123	005D0000001AIPI5	Product
ExternalODataCallout	20170330012053.1	4A13Cxjp_-heAF0FkffKqk	00D000000000123	005D0000001AIPI5	Product
ExternalODataCallout	20170330012055.0	4A13D078xgnKKs-0FKfceaV	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012059.3	4A13DNO6xM_Ks-0FKfceaV	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012059.6	4A13DNO6xM_Ks-0FKfceaV	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012106.7	4A13DneUiX0eAF0FkffKqk	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012107.2	4A13DneUiX0eAF0FkffKqk	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012111.7	4A13E5dBcgWksF0FKfceaV	00D000000000123	005D0000001WIP0	Product
ExternalODataCallout	20170330012115.4	4A13EfifLaE7fV0FKeNEp-	00D000000000123	005D0000001WQP2	Product
ExternalODataCallout	20170330012123.2		00D000000000123	005D0000001WQP2	Product
ExternalODataCallout	20170330041759.5	4A1CsAEVRrO7zF0FKfceaV	00D000000000123	005D0000001WQP2	Product
ExternalODataCallout	20170330041821.0	4A1CtdfegQTCV-0FKfdnFV	00D000000000123	005D0000001WQP2	Product
ExternalODataCallout	20170330012121.4		00D000000000123	005D0000001WIP0	Supplier

SEE ALSO:

[REST API Developer Guide: Using Event Monitoring](#)

[Trailhead: Event Monitoring](#)

[Track External Object Callouts Comprehensively \(Pilot\)](#)

Retrieve and Deploy Compact Layouts for External Objects

You can now use Metadata API to retrieve and deploy compact layouts for external objects. This change applies to both Lightning Experience and Salesforce Classic.

Previously, the following Metadata API fields and type weren't available for external objects.

- The `compactLayoutAssignment` and `compactLayouts` fields on the `CustomObject` type
- The `CompactLayout` type

SEE ALSO:

[Metadata API Developer Guide](#)

New Orgs Get an Improved OData 2.0 Adapter for Salesforce Connect

To address previous issues, we improved the OData 2.0 adapter for orgs created in Spring '18. Orgs created before Spring '18 don't yet benefit from these improvements. As a result, there are behavior differences between older orgs and those created in Spring '18. These changes apply to both Lightning Experience and Salesforce Classic.

Orgs created *before* Spring '18 experience the following behaviors with the OData 2.0 adapter for Salesforce Connect. We plan to fix these issues across all orgs in a later release, but if you need these issues resolved in your org now, contact Salesforce Customer Support.

- OData queries fail when the JSON query responses don't present the metadata before the properties. Users get an external object error regarding no valid OData JSON format.
- In the callout event monitoring pilot, these fields aren't supported for External OData Callout events.
 - `NEXT_LINK`
 - `PARENT_CALLOUT`
 - `ROWS_FETCHED`

- THROUGHPUT

SEE ALSO:

[Track External Object Data Callouts with Event Log Files \(Pilot\)](#)

General Setup: Experienced-Based Action Overrides, A Granular User Permission for Roles, List Custom Setting Management

Create a different standard action override for each experience: Lightning Experience, Salesforce Classic, and mobile. If a user needs to be able to look at roles or the role hierarchy, there's a new user permission for that. You no longer have to give the user View Setup and Configuration. In the user interface, flip a switch to let you and other admins create custom settings of type List. All that, and we renamed the user permission that lets users use customized actions.

IN THIS SECTION:

[Control Access to Roles and Role Hierarchy with a New Permission](#)

Starting in Spring '18, we're securing access to roles and role hierarchy data with a new permission called View Roles and Role Hierarchy. Use this permission with functionality that requires users to view roles or the role hierarchy, such as forecasting, but doesn't require access to the rest of Setup.

[Assign Separate Standard Action Overrides for Different Experiences](#)

The action override screen for standard actions, like New, View, and Edit, has gotten a makeover. Now you can easily assign different overrides for Salesforce Classic, Lightning Experience, and mobile. For example, for the same standard action, you can set a Visualforce page override in Salesforce Classic, a Lightning page override in Lightning Experience, and a Lightning component override in mobile. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Access Schema Settings in Setup](#)

You can now manage the availability of the list custom settings type when creating custom settings. The list type provides a reusable set of static data that you can access across your org. To prevent creating custom settings when using application-level data definitions, disable this option in Setup.

[The Allow WebLink Access via the Tooling API System Permission Has a New Name](#)

To clarify what the Allow WebLink Access via the Tooling API permission does, we renamed it to Allow Access to Customized Actions. The permission is enabled by default for all profiles, except Chatter Free User, Chatter External User, Cloud Integration User, and custom profiles cloned from them.

[Locale-Friendly Address Formats](#)

We've updated the addresses in Salesforce to support locale-friendly formats. You're welcome! These changes apply to both Lightning Experience and Salesforce Classic.

["Stop Automated Field Updates from Suppressing Email Notifications" Critical Update Postponed](#)

This critical update, released in Summer '17, was scheduled for auto-activation on June 1, 2018, but has been postponed to February 28, 2019.

SEE ALSO:

[Send Actions Setup Page is Available in Lightning Experience](#)

Control Access to Roles and Role Hierarchy with a New Permission

Starting in Spring '18, we're securing access to roles and role hierarchy data with a new permission called View Roles and Role Hierarchy. Use this permission with functionality that requires users to view roles or the role hierarchy, such as forecasting, but doesn't require access to the rest of Setup.

- !** **Important:** If you use the View Setup and Configuration permission in org profiles to let users view roles, modify such profiles to use the View Roles and Role Hierarchy permission instead. Remember to grant the Manage Roles permission if you also want users to create, modify, or delete roles.

In Spring '18, the View Roles and Role Hierarchy permission is:

- Automatically enabled for all standard and custom user profiles associated with the [standard Salesforce license](#).
- Automatically enabled for existing users who need access to roles for forecasting, external user management, and delegated administration.
- Available for role-based licenses such as Customer Community Plus, Partner Community, and for similar portal licenses.

- ?** **Note:** Users with this permission can view roles and the role hierarchy via the API. In Salesforce Classic, users with this permission can view roles and role hierarchy data on the View Roles page. For users without access to Setup, admins must provide a direct link to the View Roles page. This feature is not supported in Lightning Experience.

Assign Separate Standard Action Overrides for Different Experiences

The action override screen for standard actions, like New, View, and Edit, has gotten a makeover.

Now you can easily assign different overrides for Salesforce Classic, Lightning Experience, and mobile. For example, for the same standard action, you can set a Visualforce page override in Salesforce Classic, a Lightning page override in Lightning Experience, and a Lightning component override in mobile. This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

The screenshot shows the 'Override Properties' dialog box. It includes fields for Label (View), Name (View), and Default (Standard page). Under 'Salesforce Classic Override', the 'Visualforce page' option is selected, with 'accountDisplay [accountDisplay]' entered. Under 'Lightning Experience Override', the 'Lightning component' option is selected, with 'c:expenseOverrideView' entered. Under 'Mobile Override', the 'Lightning component' option is selected, with 'c:expenseOverrideView' entered. There is also a 'Comment' text area and 'Save' and 'Cancel' buttons at the bottom.

EDITIONS

Available in: **All** Editions

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer** Editions

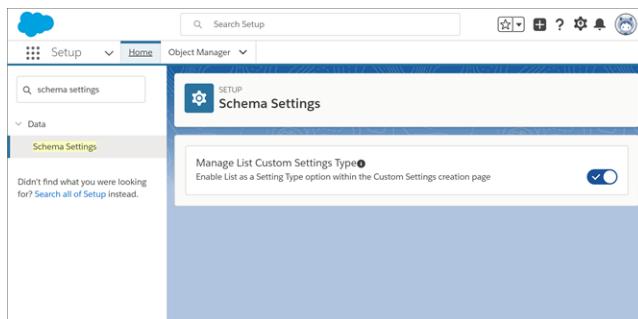
When setting up a Lightning Experience override with a Lightning page, only record pages assigned as the org default are supported.

Access Schema Settings in Setup

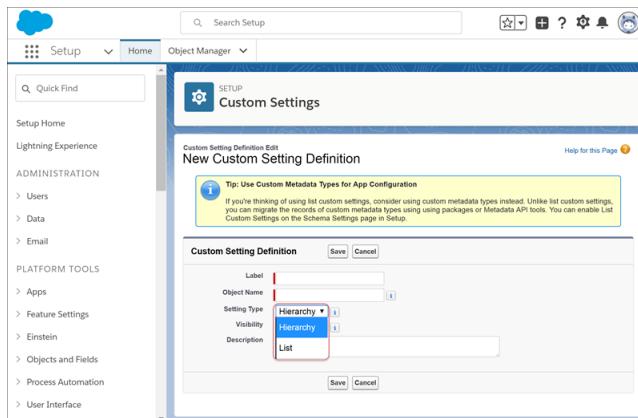
You can now manage the availability of the list custom settings type when creating custom settings. The list type provides a reusable set of static data that you can access across your org. To prevent creating custom settings when using application-level data definitions, disable this option in Setup.

Important: We strongly suggest using custom metadata types instead. Unlike list custom settings, you can migrate the records of custom metadata types using packages or Metadata API tools.

If you want to use the list setting type, you can enable the option in Schema Settings. In Setup, enable the list as a setting type.



With the option enabled, you can choose **List** as the setting type when defining a new custom setting.



The Allow WebLink Access via the Tooling API System Permission Has a New Name

To clarify what the Allow WebLink Access via the Tooling API permission does, we renamed it to Allow Access to Customized Actions. The permission is enabled by default for all profiles, except Chatter Free User, Chatter External User, Cloud Integration User, and custom profiles cloned from them.

If the following permissions are disabled for a profile, the profile users see a set of system-defined actions on object record pages in Lightning Experience and the Salesforce mobile app.

- Allow Access to Customized Actions

EDITIONS

Available in: **Group, Professional, Developer, Enterprise, Performance, Unlimited, and Database.com** Editions

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer** Editions

- The admin permissions View All Data, Modify All Data, and View Setup and Configuration

If a profile has the admin permissions enabled, users see customized actions from the object's page layout, even when the Allow Access to Customized Actions permission is disabled.

Locale-Friendly Address Formats

We've updated the addresses in Salesforce to support locale-friendly formats. You're welcome!

These changes apply to both Lightning Experience and Salesforce Classic.

For detailed information about all the locale-specific support, see [Supported Locales](#) in Salesforce Help.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Database.com, and Developer** Editions

"Stop Automated Field Updates from Suppressing Email Notifications" Critical Update Postponed

This critical update, released in Summer '17, was scheduled for auto-activation on June 1, 2018, but has been postponed to February 28, 2019.

SEE ALSO:

[Summer '17 Release Notes: Stop Automated Field Updates from Suppressing Email Notifications \(Critical Update\)](#)

[Critical Updates](#)

EDITIONS

Available in: **Professional, Enterprise, Unlimited, and Developer** Editions

AppExchange: More Payment Options and Enhanced Installs

AppExchange Checkout now lets you pay with your bank account, giving you more flexibility when you're ready to buy an app, component, or other product. We also give you more information about the approval status of managed packages during installation.

IN THIS SECTION:

[Make Purchases on AppExchange with Your Bank Account](#)

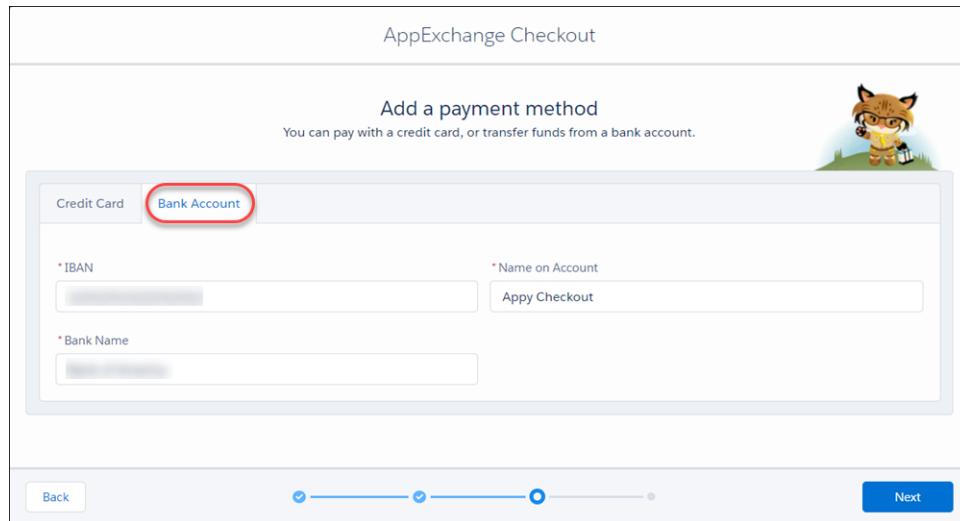
If you're buying a product that uses AppExchange Checkout, you can now make the purchase with funds from a checking, savings, or money market account. The AppExchange provider decides whether to accept bank payments on a listing. If the option is available, it appears when you choose a payment method for the product.

[See the Approval Status of an AppExchange Package](#)

We made it easier to understand the approval status of the packages you install. During package installation, we notify you if the managed package isn't authorized by the AppExchange Partner Program.

Make Purchases on AppExchange with Your Bank Account

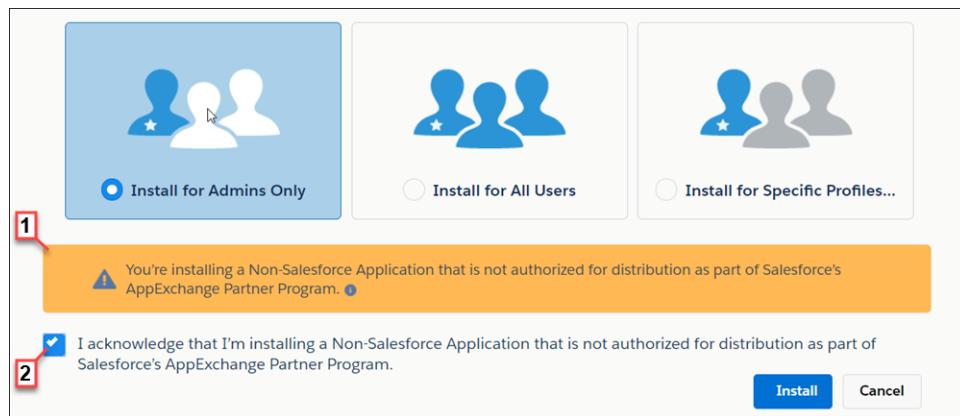
If you're buying a product that uses AppExchange Checkout, you can now make the purchase with funds from a checking, savings, or money market account. The AppExchange provider decides whether to accept bank payments on a listing. If the option is available, it appears when you choose a payment method for the product.



 **Note:** If you're based in the US, Checkout supports bank payments only from accounts linked to registered businesses. You can't make purchases with a personal bank account.

See the Approval Status of an AppExchange Package

We made it easier to understand the approval status of the packages you install. During package installation, we notify you if the managed package isn't authorized by the AppExchange Partner Program.



The notification (1) appears when you configure the package installation settings. Before you install the package, you must confirm that you understand that the package isn't authorized for distribution (2).

For information about the AppExchange Partner Program and its requirements, visit the [Salesforce Partner Community](#). For information about non-Salesforce providers, see our [Master Subscription Agreement](#).

Security and Identity: Hourly Event Log Files, More Dynamic Branding, and Easier Custom Baseline Updates

You can now get event log files hourly or daily, and delete them as needed. Add dynamic branding to your Embedded Login and authentication providers. And update your Security Health Check custom baselines with new settings right from the UI.

IN THIS SECTION:

[Authentication and Identity: Dynamic Login Experiences for Embedded Login and Auth. Providers, More Identity Tools, Optimized SSO, and Contactless External Identity Users](#)

Extend dynamic branding—and add multi-language support—to your website login page. Add dynamic branding to Auth. provider URLs. Control when community users are challenged to verify their identity, and set up identity verification easier through a centralized Setup page. Create login flows in Visualforce to fully control the look of your customers' login experience. Extend sessions to keep your employees and customers in your community longer. Create light-weight external identity users by creating external identity users without contact information.

[Salesforce Shield: Hourly Event Log Files \(Beta\), Log File Deletion, Key Derivation Opt-Out \(Beta\), and More Encrypted Fields](#)

As part of a beta release, you now get both hourly and daily event log files. Also, you can delete event log files containing user activity to be compliant with your security policies. Platform Encryption encrypts more fields and offers more deterministic encryption functionality. Bring Your Own Key customers can opt out of key derivation and upload their own data encryption key. A streamlined setup UI helps you navigate your encryption tasks more easily.

[Security Health Check: New Settings and Easier Custom Baseline Updates](#)

We added settings to enhance security. If you're using a custom baseline, you're prompted to add new settings to your baseline.

[Other Security Changes: Protect Users from Malicious Links and Schedule a Security Assessment](#)

To protect users from malicious links, we've added a warning to alert users before they leave the salesforce.com domain. Remember to request approval for and schedule a security assessment before you run vulnerability and penetration tests on Salesforce environments.

Authentication and Identity: Dynamic Login Experiences for Embedded Login and Auth. Providers, More Identity Tools, Optimized SSO, and Contactless External Identity Users

Extend dynamic branding—and add multi-language support—to your website login page. Add dynamic branding to Auth. provider URLs. Control when community users are challenged to verify their identity, and set up identity verification easier through a centralized Setup page. Create login flows in Visualforce to fully control the look of your customers' login experience. Extend sessions to keep your employees and customers in your community longer. Create light-weight external identity users by creating external identity users without contact information.

IN THIS SECTION:

[Target Your Websites with Embedded Login Dynamic Branding](#)

Extend dynamic branding to your website login page background color, login button color, and user experience by adding meta tags to your Embedded Login webpage. Salesforce Identity Embedded Login allows you to create authenticated sessions between your community and website visitors. With dynamic branding, you can determine the login page that a user sees based on certain criteria, like who the user is, or where the user is logging in from.

[Support Multi-Language Embedded Logins with the Locale Parameter](#)

Add dynamic language support for Embedded Login simply by setting the locale-code parameter in your Embedded Login script. Localize your login page for every language that your website supports.

[Add a Dynamic Login Experience to Auth. Provider URLs](#)

Deliver a different registration process depending on runtime circumstances with your community and authentication provider for social sign-on.

[Control When Users Are Prompted for Reauthentication and Reapproval Using Auth. Provider URLs](#)

You can dynamically require the authorization server to prompt internal and external users to reauthenticate or reapprove during a flow by adding the `prompt` parameter to your Auth. Provider URL. For example, you can force a user to log in again after signing up for a login account, all from the Auth. Provider URL.

[Take Full Control of Your Login Process with Visualforce Page Login Flows](#)

Have complete control over the look of your login process and how it behaves. Go beyond customizing the login page with your logo, colors, and right-side content. Use Visualforce to design more elaborate login flows that you couldn't accomplish before.

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Take advantage of fewer HTTP redirects and improve performance by using subdomain and community-specific URLs when implementing social sign-on (for example, logging in to Salesforce using Facebook credentials). To further optimize and simplify URLs, the orgID was removed. These enhancements are available to orgs with My Domain deployed. This change applies to both Lightning Experience and Salesforce Classic.

[Set Third-Party Account Links Via the API](#)

The `ThirdPartyAccountLink` standard object is now writable for Salesforce admins, so you can easily specify a third-party account link using the API. Third-party account links represent the list of external users who authenticated using an Auth. Provider. A list of third-party account links is generated when a user of an organization authenticates using an external Auth. Provider.

[Set Different Login Policies for Salesforce and Community Users \(Beta\)](#)

If you have a community set up in your org, you can now specify different login policies for internal users. Control access to the Salesforce app and communities separately, which lets you relax device activation and IP constraints for internal, trusted users to provide a better login experience. For example, you can set up less restrictive access policies for employees that log in to your community, but external users are subject to profile IP restrictions.

[Trigger Custom Application Logic When Users Log Out \(Beta\)](#)

To increase org security, you can now use Apex triggers to subscribe to logout events to run custom processes. For example, you can revoke all OAuth sessions for users when they log out of your org. Salesforce publishes logout events when the `LogoutEventStream` object is enabled. The `LogoutEventStream` object records successful user logouts only from the UI.

[Boost Customer Engagement by Extending External Identity Community Sessions \(Beta\)](#)

Make it easy for your customers and partners to stay in your community with longer sessions and fewer logins. Allow users to remain logged in after they close their browser. Keep them logged in for up to seven days of inactivity by increasing the session timeout value.

[Create External Identity Users Without Contacts \(Pilot\)](#)

Create light-weight external identity users by eliminating contact information. When Salesforce creates a user in an external identity community, it adds a contact. But if your external identity users don't use contacts, consider creating contactless users instead.

[Sandboxes Use Lowercase My Domain Hostnames](#)

Sandboxes for new production orgs now have lowercase My Domain hostnames. If you configure SAML single sign-on for these new sandboxes, confirm that your identity provider setup matches the autogenerated, lowercase My Domain hostnames in the Salesforce SAML settings.

[Implement Advanced Authentication for Android Users of Custom Domains](#)

If you have a custom domain created with My Domain, you have a new option to support advanced authentication methods for users of Salesforce mobile and Mobile SDK applications on Android devices. When enabled, Android users are redirected to their native browser when using single sign-on authentication into your custom domain.

[Connected App IP Relaxation Policy Label Is Easier to Understand](#)

To more accurately reflect the behavior of the policy for relaxing IP restrictions with second factor authentication, we changed the name of the option to **Relax IP restrictions for activated devices**. The policy's behavior is unchanged—when users access Salesforce from outside the org's restricted IP range with a verified browser or device, they bypass the org's IP restrictions. However, if they access Salesforce from a new browser or device, they bypass IP restrictions only after they successfully verify their identity.

Target Your Websites with Embedded Login Dynamic Branding

Extend dynamic branding to your website login page background color, login button color, and user experience by adding meta tags to your Embedded Login webpage. Salesforce Identity Embedded Login allows you to create authenticated sessions between your community and website visitors. With dynamic branding, you can determine the login page that a user sees based on certain criteria, like who the user is, or where the user is logging in from.

When you set up dynamic branding from Community Workspaces, you can also dynamically brand the login page that your website visitors see. On the web page where you're adding login capabilities, add these meta tags inside the `<head>` HTML element at the top of the page.

- `salesforce-use-login-page-background-color`—Determines the background color of the Embedded Login login form. If true, it uses the background color specified on the Community Workspaces Administration | Login & Registration page. If false, the color specified in the local CSS is used.
- `salesforce-use-login-page-login-button-color`—Determines the color of the login button on the Embedded Login login form. If true, it uses the button color specified on the Community Workspaces Administration | Login & Registration page. If false, the color specified in the local CSS is used.
- `salesforce-expid`—Specifies the value of the experience ID for the current user session.

SEE ALSO:

[Salesforce External Identity Implementation Guide](#)

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Support Multi-Language Embedded Logins with the Locale Parameter

Add dynamic language support for Embedded Login simply by setting the locale-code parameter in your Embedded Login script. Localize your login page for every language that your website supports.

Embedded Login takes advantage of the multi-language support that browsers provide. Set the locale-code parameter dynamically in the Embedded Login script tag <script> of your webpage. This example displays the embedded login page in Japanese.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

```
<script src="https://embeddedlogin-developer-edition.na99.force.com/demo/servlet/servlet.loginwidgetcontroller?type=javascript_widget&locale=jp" async defer></script>
```

For a list of the locale codes currently supported, see [Salesforce External Identity Implementation Guide](#).

Add a Dynamic Login Experience to Auth. Provider URLs

Deliver a different registration process depending on runtime circumstances with your community and authentication provider for social sign-on.

For example, Italian-speaking users who sign up to a community with their Facebook credentials go through a different registration process than Spanish-speaking Facebook users.

To use dynamic branding, you add the expid request parameter to the client configuration SSO initialization URL or Existing User Linking URL. The `expid` parameter identifies where the user is coming from, in this case, Spanish-speaking Facebook users:

<https://login.salesforce.com/services/auth/sso/00Di000000hqQ8EAI/FB?expid=sp>.

This release introduces experience ID support for authentication provider endpoints. These login endpoints support `expid`.

- `community-url/services/oauth2/authorize/expid_value`
- `community-url/idp/endpoint/HttpPost/expid_value`
- `community-url/idp/endpoint/HttpRedirect/expid_value`
- `community-url_login_page?expid={value}`
- `community-url/CommunitiesSelfReg?expid={value}`
- `community-url/.well-known/auth-configuration?expid={value}`
- `secur/forgotpassword.jsp?expid={value}`

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

SEE ALSO:

[Salesforce Help: Use Request Parameters with Client Configuration URLs](#)

[Salesforce Help: Create Dynamic Branding URLs](#)

[Salesforce External Identity Implementation Guide](#)

Control When Users Are Prompted for Reauthentication and Reapproval Using Auth. Provider URLs

You can dynamically require the authorization server to prompt internal and external users to reauthenticate or reapprove during a flow by adding the `prompt` parameter to your Auth. Provider URL. For example, you can force a user to log in again after signing up for a login account, all from the Auth. Provider URL.

Salesforce supports the following values for the `prompt` parameter:

- `login`—The authorization server must prompt the user for reauthentication, forcing the user to log in again.
- `consent`—The authorization server must prompt the user for reapproval before returning information to the client.

You can also pass both values, separated by a space, to require the user to both log in and reauthorize. For example:
`?prompt=login%20consent`.

```
https://login.salesforce.com/services/auth/sso/00Di000000hqQ8EAI/FB?prompt=login
```

If you don't include the `prompt` parameter, the existing user's session is used rather than the user having to log in again.

SEE ALSO:

[Salesforce Help: Use Request Parameters with Client Configuration URLs](#)

[Salesforce Help: Understanding the Web Server OAuth Authentication Flow](#)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Take Full Control of Your Login Process with Visualforce Page Login Flows

Have complete control over the look of your login process and how it behaves. Go beyond customizing the login page with your logo, colors, and right-side content. Use Visualforce to design more elaborate login flows that you couldn't accomplish before.

You've been able to create login flows using the Salesforce point-and-click tool, Cloud Flow Designer. Now you can also create login flows programmatically using Visualforce and Apex controllers and gain more flexibility. With a Visualforce Page login flow, you design the login page from scratch and determine each pixel of the page.

To create a Visualforce Page login flow, the Visualforce developer creates a login flow controller that defines the business process. The Apex controller must contain one of two new `finishLoginFlow` methods to indicate when the login flow is done and where to redirect the user upon completion.

- `Auth.SessionManagement.finishLoginFlow()` redirects users to the default home page.
- `Auth.SessionManagement.finishLoginFlow(startURL)` redirects users to a specified page in the community.

A login flow runs in a restricted session. Calling `finishLoginFlow` removes the session restriction, which gives users access to their community.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

[Salesforce Help: Custom Login Flows](#)

[Salesforce External Identity Implementation Guide](#)

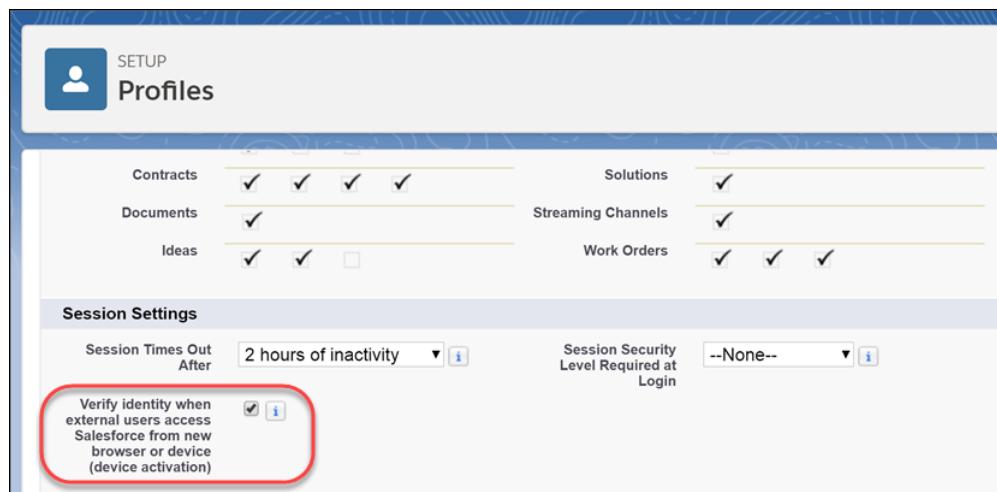
Verify Community External Users' Identity

When external users access a Salesforce community from a new device or browser, you can verify their identity as an extra measure of security. Two-factor authentication helps ensure that unauthorized users don't access your community.

In Setup, in the Quick Find box, enter *Profiles*, and then edit an external user's profile. Under Session Settings, select **Verify identity when external users access Salesforce from new browser or device (device activation)** and save the profile.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions



Note: External users are users with Customer Community, Customer Community Plus, Partner Community, or External Identity licenses. This change also applies to legacy portal licenses.

Set Identity Verification Settings and Access Policies in One Place (Beta)

Identity verification settings are now consolidated on a single Identity Verification setup page. Also, new high-assurance, session-level policies are available by request to help you secure different setup areas in your org.

The identity verification settings are still available in their old locations in Session Settings and Reports and Dashboards Access Policies pages. You can change the settings in either the old or new location to take effect.

In Setup, in the Quick Find box, enter *Identity*, and then click **Identity Verification**.

EDITIONS

Available in: **All** Editions

The screenshot shows the 'Identity Verification' setup page. It includes a list of identity verification methods and session security level policies. The 'Session Security Level Policies' section lists five categories: Reports and Dashboards, Manage Encryption Keys, Manage Auth. Providers, Manage Login Access Policies, and Manage IP Addresses. Each category has a dropdown menu set to 'Raise session to high assurance'. A red box highlights the 'Manage Encryption Keys' row, and a red circle with the number '1' points to it.

The following session-level access policies (1) are available by contacting Salesforce. You can block a user or require a user to have a stepped-up security session when accessing these areas without a high-assurance session.

- Manage Encryption Keys—Controls access to the Platform Encryption page, the Certificate and Key Management Setup page, and the TenantSecret object.
- Manage Auth. Providers—Controls access to the Auth. Providers page, the User Details Setup page, and the AuthProvider object.
- Manage Login Access Policies—Controls access to the Login Access Policies Setup page.
- Manage IP Addresses—Controls access to the Network Access Setup page.
- Manage Password Policies—Controls access to the Password Policies Setup page and profile details.

Note: This release contains a beta version of New Session-Level Access Policies, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. New Session-Level Access Policies aren't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for New Session-Level Access Policies in the [Salesforce Identity group in the Trailblazer Community](#).

Require Two-Factor Authentication Using Apex Triggers

Using an Apex trigger, you can now require user identity verification to help protect sensitive operations for your business.

EDITIONS

The new `Auth.VerificationException` class allows third-party code to leverage the Salesforce verification framework and initiate the identity verification flow, in addition to `Auth.SessionManagement.generateVerificationUrl`.

Available in: All Editions

By throwing an instance of `Auth.VerificationException`, you no longer have to manually assemble the verification URL using `Auth.SessionManagement.generateVerificationUrl` and then perform a manual redirect.

You can also throw an `Auth.VerificationException` inside an Apex trigger and cause the system to enter the verification flow, which isn't possible with `Auth.SessionManagement.generateVerificationUrl`. When a trigger is encountered that throws the exception, API clients get an API error ("Requires extra verification"). It's then the client's responsibility to verify the user's identity. In the UI, users are prompted to verify their identity.

 **Example:** This example uses `Auth.VerificationException` to trigger verification if a user attempts to create an account without a high assurance session.

```
trigger testTrigger on Account (before insert) {
    Map<String, String> sessionMap = auth.SessionManagement.getCurrentSession();
    if(!sessionMap.get('SessionSecurityLevel').equals('HIGH_ASSURANCE')) {
        throw new Auth.VerificationException(Auth.VerificationPolicy.HIGH_ASSURANCE,
        'Insert Account');
    }
}
```

Improve Social Sign-On Performance with Optimized Auth. Provider URLs

Take advantage of fewer HTTP redirects and improve performance by using subdomain and community-specific URLs when implementing social sign-on (for example, logging in to Salesforce using Facebook credentials). To further optimize and simplify URLs, the orgID was removed. These enhancements are available to orgs with My Domain deployed. This change applies to both Lightning Experience and Salesforce Classic.

Previously, initialization and callback URLs directed to `login.salesforce.com` and included the orgID. Now they direct to the appropriate subdomain or community domain and omit the orgID. This change reduces the number of network hops your app flow has to make and eliminates the need to use the `community` parameter in URLs. Community URLs are displayed at the bottom of the Auth. Provider detail page.

Editions

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Salesforce Configuration	
Test-Only Initialization URL	https://djsp.mobile1.blitz.salesforce.com/services/auth/test/sfdc
Single Sign-On Initialization URL	https://djsp.mobile1.blitz.salesforce.com/services/auth/sso/sfdc
Existing User Linking URL	https://djsp.mobile1.blitz.salesforce.com/services/auth/link/sfdc
OAuth-Only Initialization URL	https://djsp.mobile1.blitz.salesforce.com/services/auth/oauth/sfdc
Callback URL	https://djsp.mobile1.blitz.salesforce.com/services/authcallback/sfdc
Single Logout URL	https://djsp.mobile1.blitz.salesforce.com/services/auth/rp/oicd/logout
 <input checked="" type="checkbox"/> Communities	
Community Name: napi	
Test-Only Initialization URL	https://dj.mobile1.t.force.com/napi/services/auth/test/sfdc
Single Sign-On Initialization URL	https://dj.mobile1.t.force.com/napi/services/auth/sso/sfdc
Existing User Linking URL	https://dj.mobile1.t.force.com/napi/services/auth/link/sfdc
OAuth-Only Initialization URL	https://dj.mobile1.t.force.com/napi/services/auth/oauth/sfdc
Callback URL	https://dj.mobile1.t.force.com/napi/services/authcallback/sfdc

For new auth. provider configurations, there's nothing to do—optimized URLs are automatically generated and used. For existing auth. provider configurations, we recommend that you use optimized callback URLs with your third-party apps by selecting **Use subdomain in callback URLs** in the Auth. Provider configuration page. To avoid redirect URL mismatch errors, update your third-party app configuration

to use the new URLs, and test social sign-on in a sandbox org. For best security and performance, use the same subdomain in both the initialization and callback URLs.

If you don't have My Domain deployed but have existing auth. provider configurations, you can use optimized callback URLs after deploying My Domain. After deployment, select **Use subdomain in callback URLs** in the Auth. Provider configuration page.

To create or edit authentication providers, from Setup, in the Quick Find box, enter *Auth*, and then select **Auth. Providers**.

SEE ALSO:

- [Salesforce Help: External Authentication Providers](#)
- [Salesforce Help: Using the Community URL Parameter](#)
- [Salesforce Help: My Domain](#)

Set Third-Party Account Links Via the API

The ThirdPartyAccountLink standard object is now writable for Salesforce admins, so you can easily specify a third-party account link using the API. Third-party account links represent the list of external users who authenticated using an Auth. Provider. A list of third-party account links is generated when a user of an organization authenticates using an external Auth. Provider.

Editions

Available in: **All** Editions

-  **Note:** To enable this feature, contact Salesforce Customer Support.

You can only add or delete account links using the API; you can't update existing account links.

-  **Example:** Using the API, a Salesforce admin adds the details of a user for a Google provider in the ThirdPartyAccountLink record. The user can immediately start using Google credentials to log in to Salesforce without the admin explicitly having to add Google.

Set Different Login Policies for Salesforce and Community Users (Beta)

If you have a community set up in your org, you can now specify different login policies for internal users. Control access to the Salesforce app and communities separately, which lets you relax device activation and IP constraints for internal, trusted users to provide a better login experience. For example, you can set up less restrictive access policies for employees that log in to your community, but external users are subject to profile IP restrictions.

Editions

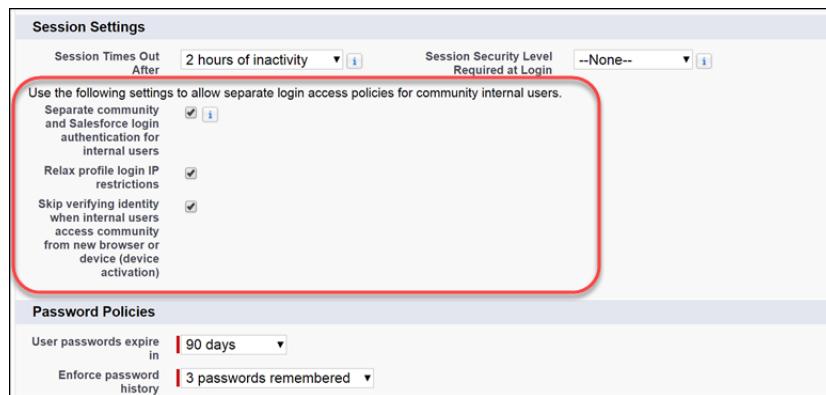
Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

-  **Note:** As a beta feature, Separate Login Policies for Salesforce and Community Users is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Separate Login Policies for Salesforce and Community Users in the [Salesforce Identity group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

-  **Note:** Salesforce admins can't create communities after enabling this option on their profile.

1. In Setup, in the Quick Find box, enter *Profiles*, and then edit an internal user's profile.

2. Under Session Settings, select **Separate community and Salesforce login authentication for internal users**.
3. To set less restrictive login policies, select **Relax profile login IP restrictions** or **Skip verifying identity when internal users access community from new browser or device (device activation)**, or both.
4. Save the profile.



Trigger Custom Application Logic When Users Log Out (Beta)

To increase org security, you can now use Apex triggers to subscribe to logout events to run custom processes. For example, you can revoke all OAuth sessions for users when they log out of your org. Salesforce publishes logout events when the LogoutEventStream object is enabled. The LogoutEventStream object records successful user logouts only from the UI.



Note: As a beta feature, the LogoutEventStream object is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the LogoutEventStream object in the [Salesforce Identity group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

After you contact Salesforce to enable the LogoutEventStream functionality in your org, you can enable the LogoutEventStream object in Session Settings.

1. In Setup, in the Quick Find box, enter *Session*, and then select **Session Settings**.
2. Under Logout Events, select **Enable Logout Events Stream**.
3. Create Apex triggers that subscribe to logout events. For example, you can revoke all refresh tokens for a user at logout.

SEE ALSO:

[Salesforce Help: Create Logout Event Triggers \(Beta\)](#)

[Object Reference for Salesforce and Force.com: LogoutEventStream \(Beta\)](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

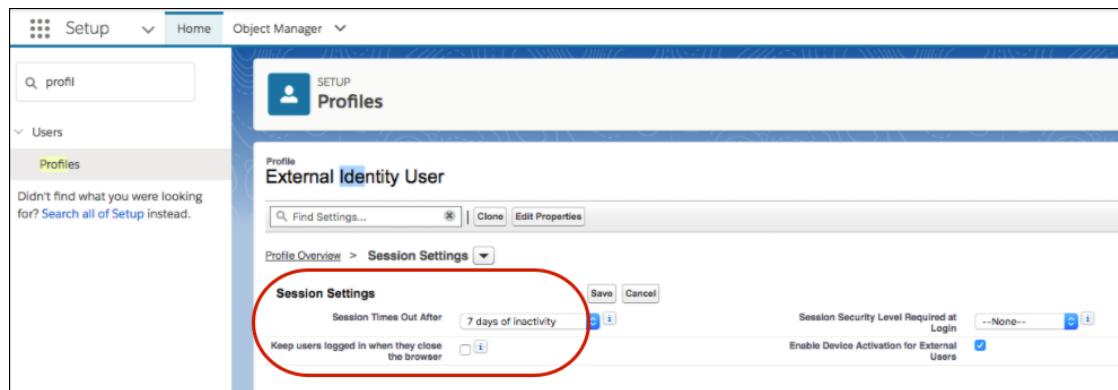
Available in: **All** Editions

Boost Customer Engagement by Extending External Identity Community Sessions (Beta)

Make it easy for your customers and partners to stay in your community with longer sessions and fewer logins. Allow users to remain logged in after they close their browser. Keep them logged in for up to seven days of inactivity by increasing the session timeout value.

 **Note:** This release contains a beta version of Extended Sessions for External Identity Users, which means it's a high-quality feature with known limitations. Extended Sessions for External Identity Users isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

By default, external identity community sessions time out after 24 hours of inactivity. Users are also logged out when they close their browser. When you enable **Keep users logged in when they close the browser**, users must intentionally log out to end a session. If you choose to enable this feature, be sure to inform your users of the new behavior.



You modify the external identity session settings from the profile of the External Identity license. If you have the org permission, Control Session Settings for External Identity User Profile, these settings appear under Session Settings.

Contact Support to enable this beta feature.

Create External Identity Users Without Contacts (Pilot)

Create light-weight external identity users by eliminating contact information. When Salesforce creates a user in an external identity community, it adds a contact. But if your external identity users don't use contacts, consider creating contactless users instead.

 **Note:** We provide Contactless Users to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. The Contactless Users feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Contactless Users in this [Trailblazer Community](#) group.

Editions

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Editions

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

The Contactless Users feature decouples the relationship between users and contacts, so you have more flexibility and less maintenance.

For example, you might not want contact information for everyone who registers for your external community. You can delay creating a contact until after they're qualified.



Note: We're piloting the Contactless User feature in this release for the external identity license. All other Communities licenses remain the same.

To use this feature, ask Salesforce to enable the org permission, Enable external identity user creation without contacts.

Sandboxes Use Lowercase My Domain Hostnames

Sandboxes for new production orgs now have lowercase My Domain hostnames. If you configure SAML single sign-on for these new sandboxes, confirm that your identity provider setup matches the autogenerated, lowercase My Domain hostnames in the Salesforce SAML settings.

If you create or refresh sandboxes for production orgs created before Spring '18, they retain the case of the My Domain hostname to remain compatible with your existing service provider-initiated SAML configurations. My Domain hostnames used with Visualforce URLs are always changed to lowercase.

Editions

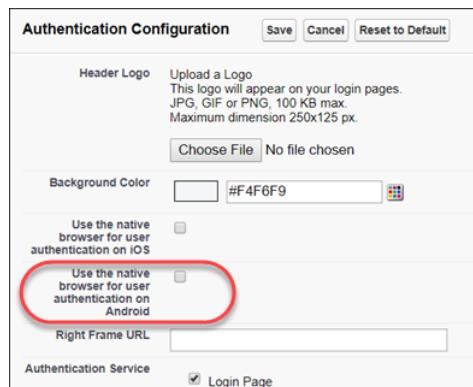
Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

Implement Advanced Authentication for Android Users of Custom Domains

If you have a custom domain created with My Domain, you have a new option to support advanced authentication methods for users of Salesforce mobile and Mobile SDK applications on Android devices. When enabled, Android users are redirected to their native browser when using single sign-on authentication into your custom domain.

Editions

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions



Enabling this option helps you support authentication methods like delegated authentication to Chrome (for example, when using Google as an identity provider), Windows NT LAN Manager (NTLM), or certificate-based authentication.

For other operating systems, the Salesforce mobile app and applications using Mobile SDK version 3.1 or later can support certificate-based authentication when the applications are integrated with Mobile Device Management (MDM) software.

To enable advanced authentication, from Setup, enter *My Domain* in the Quick Find box, then select **My Domain**. Under Advanced Authentication, click **Edit**, and then select **Use the native browser for user authentication on Android**.

SEE ALSO:

[Salesforce Help: Customize Your My Domain Login Page with Your Brand](#)

Connected App IP Relaxation Policy Label Is Easier to Understand

To more accurately reflect the behavior of the policy for relaxing IP restrictions with second factor authentication, we changed the name of the option to **Relax IP restrictions for activated devices**. The policy's behavior is unchanged—when users access Salesforce from outside the org's restricted IP range with a verified browser or device, they bypass the org's IP restrictions. However, if they access Salesforce from a new browser or device, they bypass IP restrictions only after they successfully verify their identity.

EDITIONS

Available in: **All** Editions



SEE ALSO:

[Salesforce Help: Connected App IP Relaxation and Continuous IP Enforcement](#)

[Salesforce Help: Edit Connected App Behavior](#)

Salesforce Shield: Hourly Event Log Files (Beta), Log File Deletion, Key Derivation Opt-Out (Beta), and More Encrypted Fields

As part of a beta release, you now get both hourly and daily event log files. Also, you can delete event log files containing user activity to be compliant with your security policies. Platform Encryption encrypts more fields and offers more deterministic encryption functionality. Bring Your Own Key customers can opt out of key derivation and upload their own data encryption key. A streamlined setup UI helps you navigate your encryption tasks more easily.

IN THIS SECTION:

[Platform Encryption: Key Derivation Opt-Out, More Encrypted PII Fields, Deterministic Encryption \(Beta\), Automatic Mass Decryption](#)

You asked, and we listened. Based on customer feedback, we're delivering some Shield Platform Encryption features that you requested. Now you have more control over your keys and how your data is encrypted. Preserve filtering for encrypted data, automatically decrypt data to test encryption policy changes, and quickly see how much of your data is encrypted. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Event Monitoring: Log File Deletion and Hourly Event Monitoring Data \(Beta\)](#)

As part of a beta release, you now get both hourly and daily event log files. Also, you can delete event log files containing user activity to be compliant with your security policies.

Platform Encryption: Key Derivation Opt-Out, More Encrypted PII Fields, Deterministic Encryption (Beta), Automatic Mass Decryption

You asked, and we listened. Based on customer feedback, we're delivering some Shield Platform Encryption features that you requested. Now you have more control over your keys and how your data is encrypted. Preserve filtering for encrypted data, automatically decrypt data to test encryption policy changes, and quickly see how much of your data is encrypted. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

IN THIS SECTION:

[Opt Out of Key Derivation with BYOK \(Beta\)](#)

Shield Platform Encryption's Bring Your Own Key (BYOK) service gives you even more control of your uploaded key material. You can now opt out of key derivation on a key-by-key basis. When you opt out, you can upload the complete data encryption key that you want the Shield Key Management Service to use to encrypt and decrypt your data.

[Encrypt More PII Fields on Opportunities and Contracts \(Generally Available\)](#)

You can now have another layer of security to protect personally identifiable information (PII) on opportunities and contracts. On opportunities, you can encrypt the Name, Description, and Next Step fields. On contracts, you can encrypt the Billing Address (Billing City and Billing Street).

[Store Data Privacy Preferences with the Individual Name](#)

The compliance landscape is changing, and it's more important than ever to manage your customers' wishes for how you handle their personal data. The recently added Individual object lets you store details about data privacy and protection preferences. First set up data privacy records, then encrypt the Individual Name field with the type of tenant secret and encryption scheme of your choice.

[Encrypt Activities, Email Messages, Emails to Case, and Custom Object Name \(Pilot\)](#)

Emails and time management tools play an important role in your day-to-day workflow. For another layer of security and compliance controls, you can now encrypt Activities, Email Messages, Email-to-Case messages, and Custom Object Name. You can also control the life cycle of the keys used to encrypt emails and activities to help you meet your compliance and regulatory obligations.

[Filter Encrypted Data with Deterministic Encryption Using Exact, Case-Sensitive Matching \(Beta\)](#)

Encrypt your data and retain the benefits of filtering data. When you need to filter results, choose the deterministic encryption scheme on a field-by-field basis to find exact, case-sensitive matches.

[Test-Drive Deterministic Encryption Using Exact, Case-Insensitive Matching \(Pilot\)](#)

You can use the same capabilities for the beta version of deterministic encryption, but with exact, case-insensitive matching. Case-insensitive means that a SOQL query against the Lead object, where Company = 'Acme', would return 'Acme', as well as 'acme' or 'ACME'. Similarly, when the filter-preserving scheme tests for unicity (uniqueness), each of the three versions of 'Acme' would be considered identical.

[Include Encrypted Fields in Skinny Tables \(Generally Available\)](#)

If your org uses skinny tables to optimize performance for things like reports, list views, and SOQL queries, the tables can now include encrypted fields. You can also use encrypted fields with skinny indexes. And if you thought this couldn't get better, you don't have to file a support ticket to access this feature.

[Include Encrypted Fields in Matching Rules Used in Duplicate Management \(Beta\)](#)

Encryption adds an additional layer of security to your data, but it doesn't have to get in the way of your critical business tasks. If you're hunting down duplicate records, standard and custom matching rules can now identify data that's encrypted with deterministic encryption. You'll find exact case-sensitive and case-insensitive matches, but not fuzzy matches. Contact Salesforce support to enable this feature.

[Mass Decrypt Field Data Automatically](#)

Has your encryption policy changed? Good news: We simplified decrypting data and handling due diligence on associated metadata. When you disable encryption on a field, we automatically decrypt the data in most field types. Contact Salesforce Customer Support for help decrypting custom and standard Long Text Area fields, as well as files and attachments.

[Enable Self-Service Search Index Encryption from Setup](#)

Now you have one less customer support call to make. You can enable search index encryption right from Setup without calling Salesforce. First generate a search index-type tenant secret, and then click a box to apply the tenant secret to all your search index files.

[Get Right to Work with Streamlined Encryption Setup Pages](#)

Shield Platform Encryption now has four distinct pages, so you can focus on the task at hand. Whether you're adjusting your encryption policies, managing key material, or checking your encryption statistics, find what you need in the Setup tree. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

[Check Your Encryption Coverage with Encryption Statistics \(Generally Available\)](#)

See how much of your data is encrypted with an active tenant secret. Get key statistics for maintaining compliance, stay on top of your key rotation obligations, and streamline the mass-encryption process. You can view information about encrypted fields, files, and attachments. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Opt Out of Key Derivation with BYOK (Beta)

Shield Platform Encryption's Bring Your Own Key (BYOK) service gives you even more control of your uploaded key material. You can now opt out of key derivation on a key-by-key basis. When you opt out, you can upload the complete data encryption key that you want the Shield Key Management Service to use to encrypt and decrypt your data.



Note: This release contains a beta version of Opt Out of Key Derivation, which means it's a high-quality feature with known limitations. Opt Out of Key Derivation isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

When you opt out of key derivation, you're in full control of your keys and have access to all key rotation features offered by the Shield Platform Encryption service. Because you can opt out of key derivation on a key-by-key basis, you can still choose to use the default BYOK service at any time. The default service combines your uploaded tenant secret with our master secret to derive a unique data encryption key.

Contact Salesforce to enable this feature. Then navigate to the Platform Encryption Advanced Settings page in Setup, and enable **Allow BYOK to Opt Out of Key Derivation**. From then on, you can select or deselect the **Use Salesforce key derivation** option when you upload key material.

Encrypt More PII Fields on Opportunities and Contracts (Generally Available)

You can now have another layer of security to protect personally identifiable information (PII) on opportunities and contracts. On opportunities, you can encrypt the Name, Description, and Next Step fields. On contracts, you can encrypt the Billing Address (Billing City and Billing Street).

Store Data Privacy Preferences with the Individual Name

The compliance landscape is changing, and it's more important than ever to manage your customers' wishes for how you handle their personal data. The recently added Individual object lets you store details about data privacy and protection preferences. First set up data privacy records, then encrypt the Individual Name field with the type of tenant secret and encryption scheme of your choice.

SEE ALSO:

[Store Certain Data Privacy Preferences](#)

Encrypt Activities, Email Messages, Emails to Case, and Custom Object Name (Pilot)

Emails and time management tools play an important role in your day-to-day workflow. For another layer of security and compliance controls, you can now encrypt Activities, Email Messages, Email-to-Case messages, and Custom Object Name. You can also control the life cycle of the keys used to encrypt emails and activities to help you meet your compliance and regulatory obligations.

During the pilot, you can encrypt the Event Description and Task Comments fields and these data elements in the Email Message: Text Body, HTML Body, Headers, Subject, From Name, From Address, To Address, CC Address, BCC Address, and the Email Message Relation Address.

This pilot is available only in sandbox and Developer Edition environments. Contact your Salesforce Account Executive or Success Manager to join the pilot.

 **Note:** We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

Filter Encrypted Data with Deterministic Encryption Using Exact, Case-Sensitive Matching (Beta)

Encrypt your data and retain the benefits of filtering data. When you need to filter results, choose the deterministic encryption scheme on a field-by-field basis to find exact, case-sensitive matches.

If you participated in the pilot program for deterministic encryption, you can continue to use this encryption scheme in existing orgs. Enable **Deterministic Encryption** in the Platform Encryption Advanced Settings.

 **Note:** This release contains a beta version of deterministic encryption with case insensitive filtering, which means it's a high-quality feature with known limitations. Deterministic encryption with case insensitive filtering isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

The filter-preserving deterministic encryption scheme supports exact match, case-sensitive comparisons in the following cases.

- Use external ID and unique field attributes for encrypted fields.
- Compare values in critical data by filter on encrypted values in reports, dashboards, list views, and SOQL WHERE clauses.
- Define single-column and single-column case-sensitive unique indexes on encrypted fields.
- Compare encrypted data with null and blank fields and extend your filtering capabilities.

Case-sensitive means that a SOQL query against the Lead object, where Company = 'Acme', would only return 'Acme', and not 'acme' or 'ACME'. Similarly, when the filter-preserving scheme tests for unicity (uniqueness), each of the three versions of 'Acme' would be unique.

The Name and Address compound fields aren't yet supported. For example, you can't concatenate FirstName and LastName in a single filter on Name. Instead, query FirstName and LastName using AND.

```
SELECT Id FROM Contact WHERE FirstName = 'William' AND LastName = 'Spock'
```

To access this feature, contact Salesforce Customer Support.

Test-Drive Deterministic Encryption Using Exact, Case-Insensitive Matching (Pilot)

You can use the same capabilities for the beta version of deterministic encryption, but with exact, case-insensitive matching. Case-insensitive means that a SOQL query against the Lead object, where Company = 'Acme', would return 'Acme', as well as 'acme' or 'ACME'. Similarly, when the filter-preserving scheme tests for unicity (uniqueness), each of the three versions of 'Acme' would be considered identical.

 **Note:** We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

This pilot is available only in sandbox and Developer Edition environments. To join the pilot, contact your Salesforce Account Executive or Success Manager.

Include Encrypted Fields in Skinny Tables (Generally Available)

If your org uses skinny tables to optimize performance for things like reports, list views, and SOQL queries, the tables can now include encrypted fields. You can also use encrypted fields with skinny indexes. And if you thought this couldn't get better, you don't have to file a support ticket to access this feature.

Include Encrypted Fields in Matching Rules Used in Duplicate Management (Beta)

Encryption adds an additional layer of security to your data, but it doesn't have to get in the way of your critical business tasks. If you're hunting down duplicate records, standard and custom matching rules can now identify data that's encrypted with deterministic encryption. You'll find exact case-sensitive and case-insensitive matches, but not fuzzy matches. Contact Salesforce support to enable this feature.

 **Note:** This release contains a beta version of Encryption for Matching Rules Used in Duplicate Management, which means it's a high-quality feature with known limitations. Encryption for Matching Rules Used in Duplicate Management isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

For example, if you added an encrypted field to a custom matching rule, the matching rule can identify "Kate" and "kate" as matches, but not "Kate" and "Katherine." At this time, encryption for matching rules used in duplicate management doesn't support probabilistically encrypted data.

Getting started is easy as 1-2-3. First, activate deterministic encryption on the Platform Encryption Advanced Settings page. Then contact Salesforce to enable encryption compatibility with duplicate management. After that's done, apply the deterministic encryption scheme to the fields of your choosing.

 **Example:** Let's say you already use custom matching rules to sniff out duplicated data. To protect your data, you want to encrypt the fields referenced in your existing rules. Before you encrypt those fields, deactivate your custom matching rules and make sure that deterministic encryption has been enabled for your org. Navigate to the Encryption Policy page, and select the fields you want

to encrypt. Apply the deterministic encryption scheme to your fields and save your work. After you reactivate your custom matching rule, it can identify the encrypted data.

Mass Decrypt Field Data Automatically

Has your encryption policy changed? Good news: We simplified decrypting data and handling due diligence on associated metadata. When you disable encryption on a field, we automatically decrypt the data in most field types. Contact Salesforce Customer Support for help decrypting custom and standard Long Text Area fields, as well as files and attachments.

Disable encryption for specific fields, and save your changes. The Salesforce Shield Platform Encryption service immediately runs an asynchronous job to decrypt data in those fields and sync your data with the updated encryption policy. When the process is complete, you are notified by email.

Enable Self-Service Search Index Encryption from Setup

Now you have one less customer support call to make. You can enable search index encryption right from Setup without calling Salesforce. First generate a search index-type tenant secret, and then click a box to apply the tenant secret to all your search index files.

Get Right to Work with Streamlined Encryption Setup Pages

Shield Platform Encryption now has four distinct pages, so you can focus on the task at hand. Whether you're adjusting your encryption policies, managing key material, or checking your encryption statistics, find what you need in the Setup tree. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

The new workspace includes:

- **Advanced Settings**—Unlock advanced options, such as deterministic encryption and customizable BYOK options.
- **Encryption Policy**—Customize and configure your encryption policy for specific fields, and apply encryption schemes to standard fields. Enable encryption files and attachments and other features, like Chatter.
- **Encryption Statistics**—Get key statistics for maintaining compliance, stay on top of your key rotation obligations, and gather information to streamline the mass encryption process.
- **Key Management**—Generate, upload, and manage your key material and certificates.

Check Your Encryption Coverage with Encryption Statistics (Generally Available)

See how much of your data is encrypted with an active tenant secret. Get key statistics for maintaining compliance, stay on top of your key rotation obligations, and streamline the mass-encryption process. You can view information about encrypted fields, files, and attachments. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Event Monitoring: Log File Deletion and Hourly Event Monitoring Data (Beta)

As part of a beta release, you now get both hourly and daily event log files. Also, you can delete event log files containing user activity to be compliant with your security policies.

IN THIS SECTION:

[Increase Data Protection by Deleting Event Log Files](#)

To help you comply with data protection regulations, you can delete event log files. Deleting event log file data can help you meet regulatory obligations such as Right to Erasure.

[Review Events Hourly to Improve Activity Visibility \(Beta\)](#)

You now receive event log files in hourly increments for recent activity, along with event log files after 24 hours of activity. Hourly event log files provide accelerated data, giving you quicker visibility into security anomalies and custom code performance issues. Hourly files are available in the API but not in the Event Monitoring Analytics app, unless you contact Salesforce.

[Track Insecure External Assets with Event Log Files](#)

The new Insecure External Assets event type tracks external assets accessed over the insecure HTTP protocol. The event lists all your Salesforce pages that contain insecure assets hosted on third-party sites that your users loaded with the Chrome, Firefox, Microsoft Edge, or Safari browser. Assets over HTTP can be manipulated through man-in-the-middle and other types of attacks. The attacks can trick users into sending their Salesforce credentials to malicious sites. We recommend that you change the insecure URLs from HTTP to HTTPS.

[Track User Actions in Time-Based Workflows More Comprehensively](#)

To give you more visibility into what happened during a particular user session, we added `LOGIN_KEY` and `SESSION_KEY` fields to the Time-Based Workflow event type.

[Track External Object Callouts Comprehensively \(Pilot\)](#)

We added and improved several fields for the External Cross-Org Callout, External Custom Apex Callout, and External OData Callout event types. Now you can more effectively audit the historical activity of your org's access to external object data via Salesforce Connect.

[Fields Retired in EventLogFile Event Types](#)

To enhance data protection, we retired several fields from the Document Attachment Downloads, Knowledge Article View, and Logout event types in the EventLogFile standard object.

Increase Data Protection by Deleting Event Log Files

To help you comply with data protection regulations, you can delete event log files. Deleting event log file data can help you meet regulatory obligations such as Right to Erasure.

The following data protection and privacy regulations require keeping individuals' personal data secure and private. These are some of the regulations that are important to many companies that collect and process customer data.

- General Data Protection Regulation (GDPR), European Union
- Personal Information Protection Act (PIPA), Japan
- Personal Information Protection and Electronics Documents Act (PIPEDA), Canada
- Federal Rules of Civil Procedure, United States

To give a user permission to delete event log files, you must enable a setting in Event Monitoring Setup to make the Delete Event Monitoring Records user permission available. Assign the user permission to a permission set. Then assign the permission set to the profile of the users you want to allow to delete event log files (for example, admins in charge of compliance). Using the REST or SOAP API, you can delete the event log file containing the user activity you want to remove. For details, see the delete documentation below.

 **Note:** You can't delete individual rows from event logs. Because event logs are stored in blob format in the database, you must delete the entire log file that contains the user activity.

SEE ALSO:

[REST API Developer Guide: Delete Event Monitoring Data](#)

[SOAP API Developer Guide: delete\(\)](#)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Review Events Hourly to Improve Activity Visibility (Beta)

You now receive event log files in hourly increments for recent activity, along with event log files after 24 hours of activity. Hourly event log files provide accelerated data, giving you quicker visibility into security anomalies and custom code performance issues. Hourly files are available in the API but not in the Event Monitoring Analytics app, unless you contact Salesforce.



Note: This release contains a beta version of Hourly Event Monitoring, which means it's a high-quality feature with known limitations. Hourly Event Monitoring isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Hourly Event Monitoring in [Ideas in the Trailblazer Community](#).

Beta Considerations

- Hourly Event Monitoring doesn't support site switching. If your production org instance is moved, the hourly event log files might have a gap in data. As a workaround, use the 24-hour log files.
- Hourly Event Monitoring integration with the Event Monitoring Analytics app is available upon request. When Hourly Event Monitoring is enabled in the Event Monitoring Analytics app, daily event log file data is unavailable. Data is refreshed once a day in the app, regardless of whether daily or hourly log files are used.
- Depending on event delivery and final processing time, an event can take up to three hours (from the time of the event) to be available in the log file. It occasionally takes longer.



Example: Suppose you're a security analyst monitoring for anomalous user behavior. By pulling in more frequent updates into your security system, you can be alerted within hours of a suspicious event, rather than 1–2 days later.

SEE ALSO:

[Force.com REST API Developer Guide: Generate Hourly Event Log Files \(Beta\)](#)

Track Insecure External Assets with Event Log Files

The new Insecure External Assets event type tracks external assets accessed over the insecure HTTP protocol. The event lists all your Salesforce pages that contain insecure assets hosted on third-party sites that your users loaded with the Chrome, Firefox, Microsoft Edge, or Safari browser. Assets over HTTP can be manipulated through man-in-the-middle and other types of attacks. The attacks can trick users into sending their Salesforce credentials to malicious sites. We recommend that you change the insecure URLs from HTTP to HTTPS.

The Insecure External Assets event type is available in supported Salesforce editions at no additional cost, along with the Login and Logout event types.

SEE ALSO:

[Changed Objects](#)

[Object Reference for Salesforce and Force.com: Insecure External Assets Event Type](#)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Track User Actions in Time-Based Workflows More Comprehensively

To give you more visibility into what happened during a particular user session, we added `LOGIN_KEY` and `SESSION_KEY` fields to the Time-Based Workflow event type.

- `LOGIN_KEY`—The string that ties together all events in a given user's login session. It starts with a login event and ends with either a logout event or the user session expiring.
- `SESSION_KEY`—The user's unique session ID. You can use this value to identify all user events within a session. When a user logs out and logs in again, a new session is started.

 **Example:** Use `SESSION_KEY` to correlate multiple log events that occurred within the same transaction. If a time-dependent workflow action updates a record, which then triggers additional changes, you can correlate all log file entries from that transaction using `SESSION_KEY`.

SEE ALSO:

[Changed Objects](#)

[Object Reference for Salesforce and Force.com: Time-Based Workflow Event Type](#)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Track External Object Callouts Comprehensively (Pilot)

We added and improved several fields for the External Cross-Org Callout, External Custom Apex Callout, and External OData Callout event types. Now you can more effectively audit the historical activity of your org's access to external object data via Salesforce Connect.

SEE ALSO:

[Track External Object Data Callouts with Event Log Files \(Pilot\)](#)

EDITIONS

Salesforce Connect is available in: **Developer** Edition and for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Fields Retired in EventLogFile Event Types

To enhance data protection, we retired several fields from the Document Attachment Downloads, Knowledge Article View, and Logout event types in the EventLogFile standard object.

Document Attachment Downloads

We retired the `FILE_NAME` field. If you've created custom fields and need to retrieve data from the `FILE_NAME` field, query the Document standard object. For example, `SELECT Name FROM Document WHERE Id=[ENTITY_ID value from Document Attachment Downloads log data]`.

Knowledge Article View

We retired the `USERNAME` field.

Logout

We retired the `USER_NAME` field.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

[Changed Objects](#)

Security Health Check: New Settings and Easier Custom Baseline Updates

We added settings to enhance security. If you're using a custom baseline, you're prompted to add new settings to your baseline.

IN THIS SECTION:

[Health Check Has New Security Settings](#)

Security Health Check has six new settings. These changes apply to both Lightning Experience and Salesforce Classic.

[Update a Custom Baseline with New Settings](#)

We occasionally add settings to Health Check to enhance security. Health Check settings are automatically added to the Salesforce Baseline Standard. If you have a custom baseline, it's easy to update it with the new settings right from the UI. This change applies to both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Health Check Has New Security Settings

Security Health Check has six new settings. These changes apply to both Lightning Experience and Salesforce Classic.

We added the following high-risk security setting.

- Require Secure Connections (<https://>) for all third-party domains

We added these medium-risk security settings.

- Enable Content Security Policy protection for email templates
- Enable XSS protection
- Enable Content Sniffing protection

We added the following low-risk security settings.

- Require identity verification during two-factor authentication registration
- Require identity verification for change of email address

SEE ALSO:

[Salesforce Help: How Is the Health Check Score Calculated?](#)

[Salesforce Help: Custom Baseline File Requirements](#)

Update a Custom Baseline with New Settings

We occasionally add settings to Health Check to enhance security. Health Check settings are automatically added to the Salesforce Baseline Standard. If you have a custom baseline, it's easy to update it with the new settings right from the UI. This change applies to both Lightning Experience and Salesforce Classic.

The first time you load your custom baseline after new settings are added to Health Check, you're prompted to update it. Click **Update Baseline** to add the settings. If you cancel, you are prompted again the next time you load the baseline.



Update custom baseline

New settings have been added to Security Health Check. Click Update Baseline to add 6 settings with default values to the base210b custom baseline.

[Cancel](#)

[Update Baseline](#)

Example:

SEE ALSO:

[Salesforce Help: How Is the Health Check Score Calculated?](#)

[Salesforce Help: Custom Baseline File Requirements](#)

[Salesforce Help: Create a Custom Baseline for Health Check](#)

Other Security Changes: Protect Users from Malicious Links and Schedule a Security Assessment

To protect users from malicious links, we've added a warning to alert users before they leave the salesforce.com domain. Remember to request approval for and schedule a security assessment before you run vulnerability and penetration tests on Salesforce environments.

IN THIS SECTION:

[Alert Users Before They're Redirected Outside Salesforce](#)

Protect your users from malicious links and phishing! Alert them with a warning message when they click links in Web Tabs that take them outside the salesforce.com domain. This change applies to both Lightning Experience and Salesforce Classic.

[Schedule a Security Assessment on Salesforce Environments Before Testing](#)

Before you run vulnerability and penetration tests on Salesforce environments, request approval for and schedule a security assessment by going to the [Security Assessment Notification Portal](#).

[Salesforce URLs No Longer Appear in Google Search Results](#)

We eliminated the possibility of links to your Salesforce org's pages appearing in Google search results by preventing Google from indexing your org's URLs. Previously, if one of your users publicly posted links to your org, Google could discover and publish the URLs in its search results. This change applies to both Lightning Experience and Salesforce Classic.

Alert Users Before They're Redirected Outside Salesforce

Protect your users from malicious links and phishing! Alert them with a warning message when they click links in Web Tabs that take them outside the salesforce.com domain. This change applies to both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **All** Editions

In Setup, search for *Session Settings*. Under **Redirections**, select **Warn users before they are redirected outside of Salesforce**. And that's it. You're done! Now, when users in your org

click a link in a Web Tab that takes them outside Salesforce, they see a warning that they're leaving the Salesforce domain. For added security, we also show the full URL and domain they're navigating to.

Schedule a Security Assessment on Salesforce Environments Before Testing

Before you run vulnerability and penetration tests on Salesforce environments, request approval for and schedule a security assessment by going to the [Security Assessment Notification Portal](#).

Make sure that you submit your request at least five business days before you start testing. Also, read and accept the Security Assessment Agreement that is provided when you initiate your request. Remember to share this agreement with the team that's doing the security assessment.

SEE ALSO:

[Salesforce Security Vulnerability Assessment and Penetration Test](#)

[Salesforce Platform Security FAQs](#)

EDITIONS

Available in: **All** Editions

Salesforce URLs No Longer Appear in Google Search Results

We eliminated the possibility of links to your Salesforce org's pages appearing in Google search results by preventing Google from indexing your org's URLs. Previously, if one of your users publicly posted links to your org, Google could discover and publish the URLs in its search results. This change applies to both Lightning Experience and Salesforce Classic.

If you perform a security audit on your org, you see a file called `robots.txt`. The file doesn't prevent Google from indexing (publishing the URL to the web page) in search results, so we also use X-Robots-Tag HTTP headers. These headers prevent a web page from being crawled and prevent Google from publishing the URL in its search results. X-Robots-Tag headers are used on all Salesforce login pages, my.salesforce.com URLs, app instances like na.salesforce.com, My Domain, and Visualforce pages. These headers are not used on Community or Sites pages.

SEE ALSO:

[Salesforce Help: Create a Custom robots.txt File for Your Community](#)

EDITIONS

Available in: **All** Editions

Salesforce IoT: IoT REST API, New Context UI, IoT Usage Monitoring, and Email Alerts

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. Explorer offers built-in integration with Salesforce data and lets you leverage your Customer Relationship Management (CRM) investments in Salesforce. This release includes a new IoT REST API to retrieve and manipulate orchestrations and their related components, and a new user interface for contexts. Also, we're introducing an IoT usage monitoring page, email alerts, and the ability to export and delete IoT data for data privacy.

EDITIONS

Available in: Lightning Experience

Available in: **Developer** Edition

Available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

[Access and Manipulate IoT Components with the Salesforce IoT REST API](#)

Starting with API version 42.0, you can use the Salesforce IoT REST API to create, retrieve, update, and delete your orchestrations and contexts. Other tasks that you can perform include activating and deactivating an orchestration. Also, you can retrieve all orchestration instances, delete an instance, and retrieve orchestration traffic and usage data.

[See Associated Events and Salesforce Object in One Glance](#)

A context specifies the sources of data that an orchestration can access: one or more platform events and, optionally, a Salesforce object. The new context page provides a visual representation of the events and reference object associated with an orchestration.

[Get IoT Usage Data at Your Fingertips](#)

Monitor your event and orchestration usage against total allocations on the Event Usage page. The Event Usage page shows the allocations for your org and the current daily event usage. It also provides a breakdown of usage by orchestration. You can view how many event messages each orchestration has processed and how many instances are active.

[Get Warned About Usage with Email Alerts](#)

If your org has at least one active orchestration, automated email alerts are sent to the orchestration owners to warn them about high usage numbers. An orchestration owner is the user who last activated the orchestration.

[Export and Delete IoT Data for Data Privacy](#)

To comply with data protection and privacy regulations, you can export and delete IoT data using REST API. You can export and delete orchestration-related data, such as orchestrations, contexts, and orchestration instances.

SEE ALSO:

[Trailhead: IoT Basics](#)

[Trailhead: Salesforce IoT Explorer Edition Basics](#)

[Salesforce Help: Salesforce IoT Explorer Edition](#)

Access and Manipulate IoT Components with the Salesforce IoT REST API

Starting with API version 42.0, you can use the Salesforce IoT REST API to create, retrieve, update, and delete your orchestrations and contexts. Other tasks that you can perform include activating and deactivating an orchestration. Also, you can retrieve all orchestration instances, delete an instance, and retrieve orchestration traffic and usage data.

The resources that the REST API provides are based on the following orchestration-related components.

- Contexts
- Orchestrations
- Activations
- Instances
- Traffic
- Usage data (per orchestration and for the entire Salesforce org)

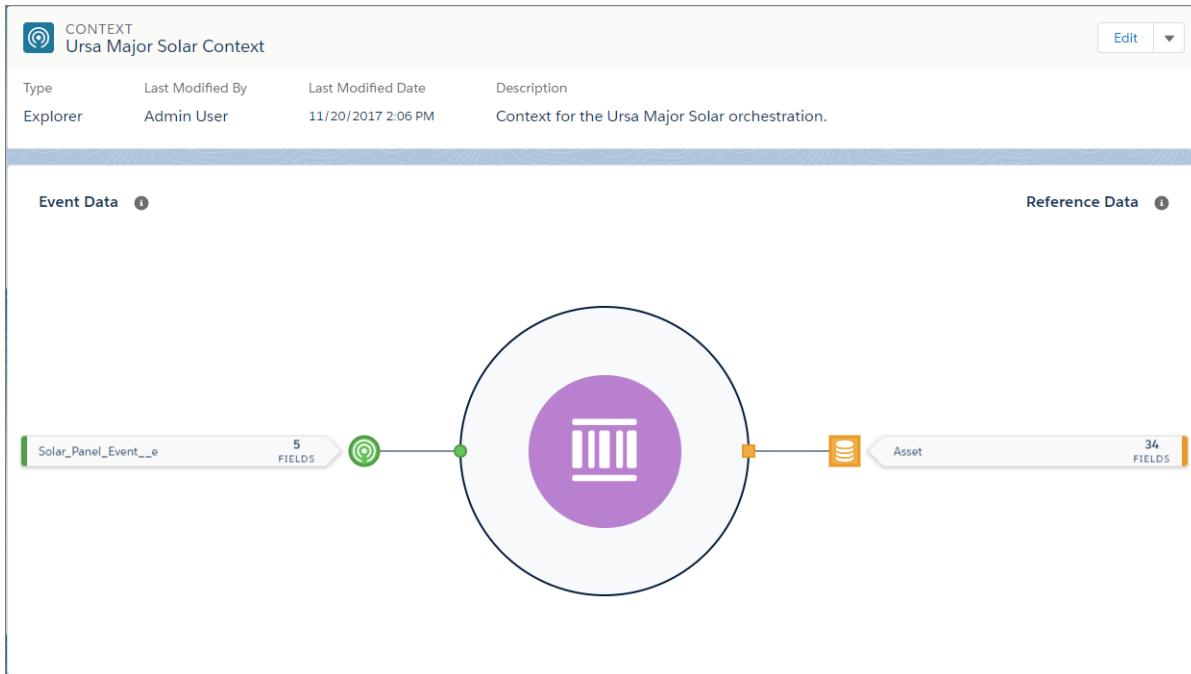
SEE ALSO:

[Salesforce IoT REST API Getting Started Guide](#)

See Associated Events and Salesforce Object in One Glance

A context specifies the sources of data that an orchestration can access: one or more platform events and, optionally, a Salesforce object. The new context page provides a visual representation of the events and reference object associated with an orchestration.

To create a context, from Setup, enter `IoT` in the Quick Find box, then select **Contexts**. You can edit the context and add platform events or a Salesforce reference object.



Select a platform event through a wizard, which includes a list of predefined platform events. Preview event fields, and select a key field to match with an orchestration instance. Only fields eligible for use as keys are shown. Similarly, select a Salesforce object and an eligible key field using the reference data wizard.

Get IoT Usage Data at Your Fingertips

Monitor your event and orchestration usage against total allocations on the Event Usage page. The Event Usage page shows the allocations for your org and the current daily event usage. It also provides a breakdown of usage by orchestration. You can view how many event messages each orchestration has processed and how many instances are active.

To access the Event Usage page, from Setup, enter `IoT` in the Quick Find box, then select **Usage Data**.

This sample usage page is for an org with many orchestrations, but only two are shown. The number of event messages processed across all orchestrations is below the allocation of 500,000 events per day.

The screenshot shows the Event Usage page with the following details:

Event Usage
Allocation: 500,000 event messages per rolling 24-hour window
Since Mon, Nov 20, 11:00 AM

Processed Event Messages	Unprocessed Event Messages
283,695	10,800

Orchestration Usage
Allocation: 10,000 instances per orchestration
50 item(s) • Sorted by Processed Events Messages

Orchestration	Status	Instances	Processed Events Messages	Unprocessed Event Messages
Ursa Major Solar Orchestration	Activated	4001	5010	0
Robot Orchestration	Activated	10491	10508	400

Note: Event messages trigger orchestration instances and are processed in batches. Due to the batch nature of event processing, orchestration usage can sometimes slightly exceed the instance allocation.

Get Warned About Usage with Email Alerts

If your org has at least one active orchestration, automated email alerts are sent to the orchestration owners to warn them about high usage numbers. An orchestration owner is the user who last activated the orchestration.

An email alert is sent when:

- An orchestration instance usage nears its allocation. This email is sent to the orchestration owner.
- The event usage across all orchestrations nears the daily event message allocation. This email is sent to all users who own at least one active orchestration.
- Event messages aren't being processed, either due to exceeding the orchestration instance allocation or the daily event allocation. Depending on the cause of the alert, the email is sent either to the orchestration owner or all users who own at least one active orchestration.

Export and Delete IoT Data for Data Privacy

To comply with data protection and privacy regulations, you can export and delete IoT data using REST API. You can export and delete orchestration-related data, such as orchestrations, contexts, and orchestration instances.

Development: Create Your Own Salesforce App

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to Lightning Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

IN THIS SECTION:

[Einstein Platform Services: Image Recognition and Natural Language Processing](#)

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train your own custom classifiers to solve a vast array of specialized image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind that text. Make your apps smarter, and look like a genius at the same time.

[Lightning Components: More and Better Components to Accelerate Your Development](#)

The Lightning Component framework powers Lightning Experience, Salesforce for Android, Salesforce for iOS, and Salesforce mobile web. Use the framework to build apps and pages for mobile devices, Lightning Experience, Salesforce Classic, and Communities.

[Visualforce: Lightning Experience Readiness](#)

Develop apps to customize your org using Visualforce. Changes in this release focus on simplifying the migration of your Visualforce pages to Lightning Experience.

[Custom Metadata: Easy-to-Use Referencing of Custom Metadata Type Records in Validation Rules \(Pilot\)](#)

Expand the use of custom metadata types with easy-to-use declarative tools. These changes apply to both Lightning Experience and Salesforce Classic.

[Apex: Platform Cache in Lightning and New Methods](#)

Apex is a programming language that uses Java-like syntax and acts like database stored procedures. Apex enables developers to add business logic to system events, such as button clicks, updates of related records, and Visualforce pages.

[API](#)

Access more metadata types and data objects in API version 42.0.

[Debugging: Logging Improvements, More Debugging for ISVs, Event Types for External Object Callouts](#)

Public site users no longer need a browser cookie to activate debug logging. Debug logs are no longer filled with ENTERING__MANAGED__PKG events when your log level for the Apex Code category is INFO or DEBUG. ISVs now get a free ISV Customer Debugger session, even if they've purchased Apex Debugger sessions. New and updated event types let you troubleshoot issues regarding accessing external object data.

[Developer Hub: Manage Your Scratch Orgs](#)

Use the Developer Hub (Dev Hub) to create, delete, and manage your scratch orgs. After you set up your project on your local computer, authorize the Dev Hub org using the Salesforce CLI.

[Get All Metadata API Entities with Expanded Source Tracking \(Beta\)](#)

Expands your reach to the entire set of Metadata API entities when pushing and pulling source, or getting the status for your project source changes.

[Packaging: Unlocked Packages \(Beta\) with More Supported Components and Other Enhancements](#)

Create and manage second-generation packages, including unlocked packages, using the Salesforce CLI.

[Code Smarter with Salesforce Extensions for VS Code](#)

Salesforce Extensions for VS Code, the Salesforce extension pack for the Visual Studio Code editor, releases updates most weeks. In recent releases, we enhanced our code smartness features and made the Apex Debugger extension more robust. Here are a few highlights from the updates we've made since the extension pack went GA in mid-October 2017.

[Force.com IDE 2 Beta Discontinued](#)

The Force.com IDE 2 beta release has been discontinued. We are not providing future releases of this tool, and no downloads are available after May 3, 2018. You cannot access the Force.com IDE 2 Developer Guide as of April 23, 2018.

[Save Time by Cloning Sandboxes \(Beta\)](#)

You can create a sandbox by cloning an existing sandbox rather than using your production org as your source. Save time by customizing a sandbox with a set of data and metadata and then replicating it. Sandbox cloning simplifies having multiple concurrent streams of work in your application life cycle. You can set up a sandbox for each type of work, such as development, testing, and staging. Your colleagues can easily clone individual sandboxes instead of sharing one sandbox and avoid stepping on each other's toes. This feature is available when the Sandbox Cloning beta begins on February 12, 2018. This change applies to both Lightning Experience and Salesforce Classic.

[Salesforce CLI: New Commands and Easier Installation](#)

Use the Salesforce command-line interface (CLI) to easily create environments for development and testing, synchronize source code, run tests, and control the full application life cycle. These new and changed features are available when Salesforce CLI v42 is released on February 10, 2018.

[ISVforce: AppExchange Trailblazer Scorecard and Packaging Enhancements](#)

The AppExchange Trailblazer Scorecard tracks achievements on your partner journey and makes recommendations to help you grow your Salesforce business. We also made packaging enhancements to give you more control over the AppExchange products that you distribute.

[Enterprise Messaging: Change Data Capture Enhancements, High-Volume Platform Events, and Better Connection Handling in Streaming API](#)

Use events to simplify communication between business systems. With the Change Data Capture pilot, receive real-time notifications of record changes in Salesforce. With the High-Volume Platform Events pilot, deliver and receive millions of custom events efficiently.

Einstein Platform Services: Image Recognition and Natural Language Processing

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train your own custom classifiers to solve a vast array of specialized image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind that text. Make your apps smarter, and look like a genius at the same time.

IN THIS SECTION:

[JWT Token Is Now Longer](#)

The JWT tokens you use to call the API are now longer. You see this change whether you use the token web page at <https://api.einstein.ai/token> or generate it in code by calling the /oauth2/token endpoint.

[Change API Endpoint to Maintain Access to Einstein Platform Services](#)

All the Einstein Platform Services and functionality have a new address. We're deprecating the `api.metamind.io` endpoint. Update your code and tools to reference `https://api.einstein.ai`. You still have access to all the Einstein Platform Services, only the endpoint is changing.

[Einstein Vision: Object Detection, Getting All Image Examples for a Label](#)

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

[Einstein Language: Learning Curve Metrics, Precision-Recall Curve, Getting All Text Examples for a Label](#)

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

JWT Token Is Now Longer

The JWT tokens you use to call the API are now longer. You see this change whether you use the token web page at <https://api.einstein.ai/token> or generate it in code by calling the /oauth2/token endpoint.

The screenshot shows a web-based token generator. At the top, there's a field labeled "Email or Account ID" with a placeholder "Email or Account ID". Below it is a "Private Key" section containing a text area with the following RSA private key content:

```
-----BEGIN RSA PRIVATE KEY-----  
MIIEowlBAKCAQEAhPaB+oAZ/xcHExtaBD01B6
```

Below the key is a "Browse..." button followed by the file name "einstein_platform.pem". Underneath is a "Expiration in Mins" input field set to "15". A large blue "GET TOKEN" button is centered below these fields. At the bottom, the generated token is displayed in a box with the heading "Token:" and the value:
2E7KBFTLPJSJ7SMPQSSPYDA6SVOL4TKK564OR65ELVWTHRBJ
3533SE6WRUCPQSIENWEXC36Y2XFISRYTSYE5PIID7U5CUOMS
MA3T5KI

The last three lines of the token are highlighted with a red oval.

Expires in **900** secs

SEE ALSO:

[Einstein Platform Services Developer Guide: Set Up Authorization](#)

[Einstein Platform Services Developer Guide: Generate an OAuth Token](#)

Change API Endpoint to Maintain Access to Einstein Platform Services

All the Einstein Platform Services and functionality have a new address. We're deprecating the `api.metamind.io` endpoint. Update your code and tools to reference `https://api.einstein.ai`. You still have access to all the Einstein Platform Services, only the endpoint is changing.

Einstein Vision: Object Detection, Getting All Image Examples for a Label

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

IN THIS SECTION:

[Locate Image Objects with Einstein Object Detection](#)

Train deep-learning models to recognize and count multiple distinct objects within an image using the Einstein Object Detection API. The API identifies objects within an image and provides details, like the size and location of each object.

[Get All Image Examples for a Label](#)

You can return all image examples for a single label by passing in the label ID. This new call means you can target the examples you want to retrieve, instead of getting all the examples for a dataset and paging through them.

SEE ALSO:

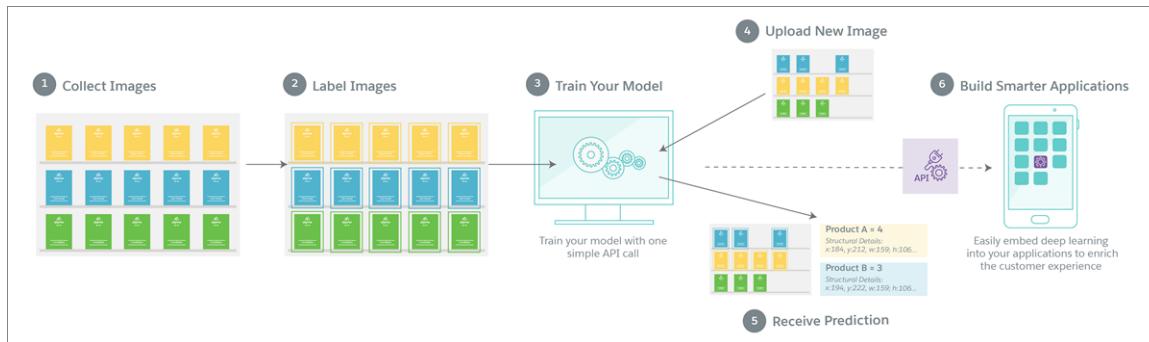
[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision](#)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Locate Image Objects with Einstein Object Detection

Train deep-learning models to recognize and count multiple distinct objects within an image using the Einstein Object Detection API. The API identifies objects within an image and provides details, like the size and location of each object.

For each object or set of objects identified in an image, the API returns the coordinates for the object's bounding box and a class label. It also returns the probability of the object matching the class label. Some scenarios for using the Object Detection API include locating logos in images or counting products on shelves.



Einstein Object Detection is part of Einstein Vision, so the calls that you make are similar to the calls for image and multi-label models. But an object detection model is different from a multi-label model. A multi-label model returns the probability that particular objects are in an image. In contrast, an object detection model identifies the location of specific objects within an image.

Start with the Dataset

To create a detection model, you start with the dataset. When you create the dataset, specify `image-detection` as the type. This cURL call creates a dataset.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache" -H "Content-Type: multipart/form-data" -F "path=http://<DATA_URL>/products.zip" -F "type=image-detection" https://api.einstein.ai/v2/vision/datasets/upload
```

To create the model, train the detection dataset using the same endpoint as a standard classification model:

<https://api.einstein.ai/v2/vision/train>.

Classify an Image

Classifying an image uses the new `/detect` endpoint. The image you pass in can be on a local drive or referenced by a URL.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache" -H
"Content-Type: multipart/form-data" -F "modelId=<YOUR_MODEL_ID>" -F
"sampleLocation=http://web.yoursite.com/<IMAGE_FILE>.png"
https://api.einstein.ai/v2/vision/detect
```

Let's say that a company is using the API to detect products on store shelves. After you send an image in for detection, you receive a response that looks like this JSON. The labels that you see vary depending on the labels in your model. The response returns a label, a probability, and the coordinates for the bounding box. These coordinates specify where the item was detected in the image.

```
{
  "probabilities": [
    {
      "label": "Bran Cereal",
      "probability": 0.9994634,
      "boundingBox": {
        "minX": 325,
        "minY": 300,
        "maxX": 483,
        "maxY": 402
      }
    },
    {
      "label": "Out of Stock",
      "probability": 0.99834275,
      "boundingBox": {
        "minX": 536,
        "minY": 322,
        "maxX": 647,
        "maxY": 385
      }
    },
    {
      "label": "Oat Cereal",
      "probability": 0.9977386,
      "boundingBox": {
        "minX": 697,
        "minY": 356,
        "maxX": 789,
        "maxY": 395
      }
    },
    {
      "label": "Protein Mix",
      "probability": 0.99745244,
      "boundingBox": {
        "minX": 40,
        "minY": 289,
        "maxX": 150,
        "maxY": 350
      }
    }
  ]
}
```

```

        "maxY": 332
    }
},
{
    "label": "Corn Flakes",
    "probability": 0.9832312,
    "boundingBox": {
        "minX": 390,
        "minY": 101,
        "maxX": 431,
        "maxY": 134
    }
},
{
    "label": "Other",
    "probability": 0.94256777,
    "boundingBox": {
        "minX": 368,
        "minY": 350,
        "maxX": 447,
        "maxY": 408
    }
}
]
}
]
```

SEE ALSO:

[Einstein Platform Services Developer Guide: Determine the Model Type You Need](#)

[Einstein Platform Services Developer Guide: Create a Dataset From a Zip File Asynchronously](#)

Get All Image Examples for a Label

You can return all image examples for a single label by passing in the label ID. This new call means you can target the examples you want to retrieve, instead of getting all the examples for a dataset and paging through them.

This cURL call returns all labels for the specified label ID.

```
curl -X GET -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache"
https://api.einstein.ai/v2/vision/examples?labelId=<LABEL_ID>
```

The response looks similar to this JSON.

```
{
    "object": "list",
    "data": [
        {
            "id": 322291,
            "name": "583673532.jpg",
            "location": "https://u7kEqOMaHuNOS7Wp2oOgtKQwPs2AgkwOwqHB...",
            "createdAt": "2017-04-12T18:38:19.000+0000",
            "label": {
                "id": 3235,
                "datasetId": 1000475,
                "name": "Mountains",
            }
        }
    ]
}
```

```
        "numExamples": 108
    },
    "object": "example"
},
{
    "id": 322292,
    "name": "483951488.jpg",
    "location": "https://6fu7kEqOMaHuNOS7Wp2oOgtKQwPs2AgkwOwq...",
    "createdAt": "2017-04-12T18:38:19.000+0000",
    "label": {
        "id": 3235,
        "datasetId": 1000475,
        "name": "Mountains",
        "numExamples": 108
    },
    "object": "example"
}
]
```

SEE ALSO:

[Einstein Platform Services Developer Guide: Get All Examples For Label](#)

Einstein Language: Learning Curve Metrics, Precision-Recall Curve, Getting All Text Examples for a Label

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

IN THIS SECTION:

[Build Natural Language Processing into Your Apps with Einstein Language](#)

Use Einstein Language to analyze text and determine the user's goals or the sentiment behind text. Einstein Language is now generally available.

[Understand Your Language Model with Learning Curve Metrics](#)

The new learning curve API call gets the model metrics for each epoch (training iteration) performed to create a sentiment or intent model. Use this information to tune your model and identify the optimal number of epochs to specify when you train a dataset.

[Understand Your Language Model Using the Precision-Recall Curve](#)

When you get model metrics, the API now returns the precision-recall curve for your Einstein Language model. These metrics help you understand how well the model performs.

[Get All Text Examples for a Label](#)

You can return all text examples for a single label by passing in the label ID. This new call means you can target the examples you want to retrieve, instead of getting all the examples for a dataset and paging through them.

SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language \(Beta\)](#)

[Salesforce Einstein: Opportunity Scoring, Forecasting, Easier Setup, and Other Enhancements](#)

Build Natural Language Processing into Your Apps with Einstein Language

Use Einstein Language to analyze text and determine the user's goals or the sentiment behind text. Einstein Language is now generally available.

The Einstein Intent API categorizes unstructured text into user-defined labels to better understand what users are trying to accomplish. Use this API to analyze text from emails, chats, or web forms to:

- Determine which products prospects are interested in, and send customer inquiries to the appropriate sales person.
- Route service cases to the correct agents or departments, or provide self-service options.
- Understand customer posts to provide personalized self-service in your communities.

The Einstein Sentiment API classifies text into positive, negative, and neutral classes to understand the feeling behind text. Use this API to analyze emails, social media, and text from chat to:

- Identify the sentiment of a prospect's emails to trend a lead or opportunity up or down.
- Provide proactive service by helping dissatisfied customers first or extending promotional offers to satisfied customers.
- Monitor the perception of your brand across social media channels, identify brand evangelists, and note customer satisfaction.

Understand Your Language Model with Learning Curve Metrics

The new learning curve API call gets the model metrics for each epoch (training iteration) performed to create a sentiment or intent model. Use this information to tune your model and identify the optimal number of epochs to specify when you train a dataset.

In each epoch, machine learning happens behind the scenes to create the model. Information from an epoch is passed into the next epoch, from that epoch to the next, and so on. The metrics reveal the f1 score, accuracy, confusion matrix, and test accuracy for each training iteration performed to create the model.

Having more epochs isn't always better. For example, you train a dataset and specify 100 epochs. Using the learning curve data for the resulting model, you see that the most accurate results for that dataset are in the 85th epoch.

You can use the learning curve data to see if your model is overfit—the model predicts accurately with training data but not unseen data. Or you can see if it is underfit—the model doesn't predict accurately with training data or unseen data.

This cURL call returns the learning curve metrics for a model.

```
curl -X GET -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache"
"https://api.einstein.ai/v2/language/models/TUWBAIRLFB3KKEDZMEGIUR6COM/lc?offset=62&count=3"
```

The response looks similar to this JSON.

```
{
  "object": "list",
  "data": [
    {
      "epoch": 63,
      "metricsData": {
        "f1": [
          0.8571428571428571,
          0.9333333333333332,
          1
        ],
        "labels": [
          "hourly-forecast",
          "current-weather",
          "five-day-forecast"
        ],
        "testAccuracy": [
          0.8571428571428571,
          0.9333333333333332,
          1
        ]
      }
    }
  ]
}
```

```
"testAccuracy": 0.9166666716337204,
"trainingLoss": 0.5773116968816421,
"confusionMatrix": [
    [
        [
            3,
            0,
            0
        ],
        [
            1,
            7,
            0
        ],
        [
            0,
            0,
            1
        ]
    ],
    "trainingAccuracy": 0.7377049253612268
},
"epochResults": {},
"object": "learningcurve"
},
{
    "epoch": 64,
    "metricsData": {
        "f1": [
            0.8571428571428571,
            0.9333333333333332,
            1
        ],
        "labels": [
            "hourly-forecast",
            "current-weather",
            "five-day-forecast"
        ],
        "testAccuracy": 0.8333333432674408,
        "trainingLoss": 0.6600023683649107,
        "confusionMatrix": [
            [
                [
                    3,
                    0,
                    0
                ],
                [
                    1,
                    7,
                    0
                ],
                [
                    0,
                    0,
                    1
                ]
            ]
        ]
    }
}
```

```
        ],
      ],
      "trainingAccuracy": 0.7213114851810893
    },
    "epochResults": {},
    "object": "learningcurve"
  },
  {
    "epoch": 65,
    "metricsData": {
      "f1": [
        0.8571428571428571,
        0.9333333333333332,
        1
      ],
      "labels": [
        "hourly-forecast",
        "current-weather",
        "five-day-forecast"
      ],
      "testAccuracy": 0.9166666716337204,
      "trainingLoss": 0.6315541986192836,
      "confusionMatrix": [
        [
          [
            3,
            0,
            0
          ],
          [
            [
              1,
              7,
              0
            ],
            [
              0,
              0,
              1
            ]
          ]
        ],
        "trainingAccuracy": 0.7377049248726641
      },
      "epochResults": {},
      "object": "learningcurve"
    }
  ]
}
```

SEE ALSO:

[Einstein Platform Services Developer Guide: Get Model Learning Curve](#)

Understand Your Language Model Using the Precision-Recall Curve

When you get model metrics, the API now returns the precision-recall curve for your Einstein Language model. These metrics help you understand how well the model performs.

The precision-recall curve contains label-independent values for precision, recall, and f1 score and their corresponding thresholds.

```
{  
    "createdAt": "2017-10-26T18:00:32.000+0000",  
    "metricsData": {  
        "f1": [  
            0.8571428571428571,  
            0.9333333333333332,  
            1  
        ],  
        "labels": [  
            "hourly-forecast",  
            "current-weather",  
            "five-day-forecast"  
        ],  
        "testAccuracy": 0.9166666865348816,  
        "trainingLoss": 0.08212830490035722,  
        "confusionMatrix": [  
            [  
                3,  
                0,  
                0  
            ],  
            [  
                1,  
                7,  
                0  
            ],  
            [  
                0,  
                0,  
                1  
            ]  
        ],  
        "trainingAccuracy": 0.9836065583541744,  
        "precisionRecallCurve": {  
            "f1": [  
                0.8571,  
                0.8148,  
                0.8462,  
                0.88,  
                0.9167,  
                0.8696,  
                0.8182,  
                0.8571,  
                0.8,  
                0.6667,  
                0.5882,  
                0.5,  
                0.4,  
                0.3,  
                0.2,  
                0.1  
            ]  
        }  
    }  
}
```

```
        0.2857,  
        0.1538,  
        0  
    ],  
    "recall": [  
        1,  
        0.9167,  
        0.9167,  
        0.9167,  
        0.9167,  
        0.8333,  
        0.75,  
        0.75,  
        0.6667,  
        0.5,  
        0.4167,  
        0.3333,  
        0.25,  
        0.1667,  
        0.0833,  
        0  
    ],  
    "precision": [  
        0.75,  
        0.7333,  
        0.7857,  
        0.8462,  
        0.9167,  
        0.9091,  
        0.9,  
        1,  
        1,  
        1,  
        1,  
        1,  
        1,  
        1,  
        1,  
        1  
    ],  
    "threshold": [  
        0.1807,  
        0.1933,  
        0.3698,  
        0.3708,  
        0.5832,  
        0.6193,  
        0.626,  
        0.8401,  
        0.8404,  
        0.9023,  
        0.968,  
        0.9686,  
        0.9703,
```

```

        0.9806,
        0.981,
        1
    ]
}
},
"id": "TUWBAIRLFB3KKEDZMEGIUR6COM",
"object": "metrics"
}

```

SEE ALSO:

[Einstein Platform Services Developer Guide: Get Model Metrics](#)

Get All Text Examples for a Label

You can return all text examples for a single label by passing in the label ID. This new call means you can target the examples you want to retrieve, instead of getting all the examples for a dataset and paging through them.

This cURL call returns all labels for the specified label ID.

```
curl -X GET -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache"
https://api.einstein.ai/v2/language/examples?labelId=<LABEL_ID>
```

The response looks similar to this JSON.

```
{
  "object": "list",
  "data": [
    {
      "id": 1021817,
      "createdAt": "2017-06-08T16:31:20.000+0000",
      "label": {
        "id": 16599,
        "datasetId": 1000108,
        "name": "negative",
        "numExamples": 703
      },
      "object": "example"
    },
    {
      "id": 1021818,
      "createdAt": "2017-06-08T16:31:20.000+0000",
      "label": {
        "id": 16599,
        "datasetId": 1000108,
        "name": "negative",
        "numExamples": 703
      },
      "object": "example"
    },
    {
      "id": 1021819,
      "createdAt": "2017-06-08T16:31:20.000+0000",
      "label": {

```

```

        "id": 16599,
        "datasetId": 1000108,
        "name": "negative",
        "numExamples": 703
    },
    "object": "example"
}
]
}

```

SEE ALSO:

[Einstein Platform Services Developer Guide: Get All Examples For Label](#)

Lightning Components: More and Better Components to Accelerate Your Development

The Lightning Component framework powers Lightning Experience, Salesforce for Android, Salesforce for iOS, and Salesforce mobile web. Use the framework to build apps and pages for mobile devices, Lightning Experience, Salesforce Classic, and Communities.

Use out-of-the-box components or build your own components with JavaScript, HTML, CSS, Apex, or any web-enabled code. Use AppExchange to get components created by Salesforce partners or publish your own.

For more information, refer to the [Lightning Components Developer Guide](#).

IN THIS SECTION:

[Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing \(Critical Update\)](#)

This critical update changes the behavior of `@AuraEnabled` Apex controllers that don't specify `with sharing` or `without sharing` to default to `without sharing`. This change relaxes the security for controllers that don't explicitly set sharing behavior using these keywords. It's a best practice to **always** use `with sharing` in Apex controllers used with Lightning components.

[API Access for <lightning:container> Apps Is Revoked \(Critical Update\)](#)

API Access for `<lightning:container>` Apps Is Revoked was a critical update for Winter '18 and will be enforced for all orgs on February 10, 2018. Lightning apps that use `<lightning:container>` will no longer have access to the REST APIs from inside the iframe. Apps can still access org data through Apex remoting calls.

[Component Library \(Beta\): View Unauthenticated Site, Custom Components, and Interface Documentation](#)

Find all your components from your custom namespace and packages in one place. Interface documentation and code samples are also available now.

[Validation for Component Attribute Types](#)

The type of a component attribute is validated when you save the component. Validation at save time helps you discover attribute type errors earlier in your development process, instead of seeing errors at runtime. Save-time error messages for attribute type problems are also usually easier to review and understand.

[Find Dynamically Created Components](#)

You can now use `cmp.find()` to find a component that you create dynamically with `$A.createComponent()`.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available for use in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Create Lightning components using the UI in **Enterprise, Performance, Unlimited, Developer** Editions or a sandbox.

[Action Overrides That Use Lightning Components Are Supported in Lightning Console Apps](#)

Get ready for deeper control over what users see when viewing or editing a record or opening a list. Action overrides that use Lightning components for View, New, Edit, and Tab are now supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide. This feature is new in Lightning Experience.

[<style> Tag Not Allowed in Components](#)

You can't add a `<style>` tag in component markup or when you dynamically create a component in JavaScript code. This restriction ensures better component encapsulation and prevents component styling interfering with the styling of another component.

[Changes in Locker Service](#)

The Locker Service architectural layer enhances security by isolating individual Lightning components in their own containers and enforcing coding best practices. The framework uses Content Security Policy (CSP) to control the source of content that can be loaded on a page. Locker Service compatibility is significantly improved in this release.

[New and Changed Lightning Components](#)

Build user interfaces quickly with a bevy of new components.

[New and Changed Lightning Events](#)

Lightning events facilitate communication between components and increase interactivity in your apps.

[New and Changed Lightning Interfaces](#)

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

Use `without sharing` for `@AuraEnabled` Apex Controllers with Implicit Sharing (Critical Update)

This critical update changes the behavior of `@AuraEnabled` Apex controllers that don't specify `with sharing` or `without sharing` to default to `without sharing`. This change relaxes the security for controllers that don't explicitly set sharing behavior using these keywords. It's a best practice to **always** use `with sharing` in Apex controllers used with Lightning components.

Apex Sharing Behavior Basics

All `@AuraEnabled` custom controllers run in system mode. Consequently, the current user's credentials aren't used to execute controller logic, and the user's permissions and field-level security aren't automatically applied.

You can choose whether a controller respects a user's org-wide defaults, role hierarchy, and sharing rules by using the `with sharing` keywords in the class or method definition. For more information, see "Using the `with sharing` or `without sharing` Keywords" in the [Apex Developer Guide](#).

By default, Apex classes that don't specify either `with sharing` or `without sharing` in their definition implicitly use `without sharing`. That is, they behave as though `without sharing` was set.

However, Apex classes that don't explicitly set `with sharing` or `without sharing` inherit the value from the context in which they are run. So when a class without explicit sharing behavior is called by a class that sets one of the keywords, it operates with the sharing behavior of the calling class.

What This Critical Update Changes

Previously, Lightning component controllers that didn't explicitly set a sharing behavior operated as though `with sharing` was set. This behavior is the opposite of Apex operating in other contexts, such as Visualforce controllers.

When this critical update is enabled, the sharing behavior of Apex code respects the documented behavior and is consistent with Apex code behavior in other contexts. So when you call `@AuraEnabled` controller methods from Lightning component code, if neither the class nor method explicitly specifies the sharing behavior, the controller method implicitly uses `without sharing`.

Impact of This Critical Update

 **Important:** This critical update relaxes the security of affected Lightning component controller code. If you have `@AuraEnabled` controller methods or classes that don't explicitly specify the sharing behavior, those controller methods can allow access to records not owned by the current user when this update is enabled.

The best way to prepare for this critical update is to ensure that all your `@AuraEnabled` code explicitly controls sharing behavior using the `with sharing` or `without sharing` keywords. If all your `@AuraEnabled` code explicitly sets sharing behavior, this critical update has no effect.

While it's theoretically possible to use implicit sharing and verify correctness using tests, that strategy is flawed. It's easy to make a mistake, and a mistake is a security vulnerability. If you use implicit sharing, **you** are responsible for making certain your record access security is correct.

Critical Update Timeline

- This critical update is disabled by default in existing orgs in Spring '18.
- This critical update is enabled by default in new orgs beginning in Spring '18.
- This critical update will be automatically enabled for all orgs on the auto-activation date, currently scheduled for after the Winter '19 production release. The specific date for your org is available in the Critical Update Console in Setup.

Activate and Test This Critical Update

This update will be enabled everywhere on the auto-activation date. We recommend that you test your Lightning component controller code in a Developer Edition org before that date. If you must work in your production org, do so during off-peak hours.

To activate and test this critical update:

1. From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
2. For Use `without sharing` for `@AuraEnabled` Apex Controllers with Implicit Sharing, click **Activate**.
3. Test the behavior of components that use controllers that don't include the `with sharing` or `without sharing` keywords.

 **Warning:** You can't use Apex tests to test the impact of this critical update on the sharing behavior of `@AuraEnabled` Apex code. This limitation is because Apex code that is run from Apex tests already functions correctly and doesn't change when the critical update is enabled or disabled. Test the results on the client side from your Lightning components, manually or using a test framework such as Lightning Testing Service, to verify that behavior is correct with the critical update enabled.

API Access for `<lightning:container>` Apps Is Revoked (Critical Update)

API Access for `<lightning:container>` Apps Is Revoked was a critical update for Winter '18 and will be enforced for all orgs on February 10, 2018. Lightning apps that use `<lightning:container>` will no longer have access to the REST APIs from inside the iframe. Apps can still access org data through Apex remoting calls.

This critical update removes access to Salesforce APIs from inside the `<lightning:container>` iframe because this access is a security risk. Managed applications have full API access and can modify records not intended to be used by those applications. For example, a to-do list application could view and modify data in unrelated objects, such as Opportunities.

Activate and Test This Critical Update

We recommend testing this critical update and activating it now. This update is automatically enforced in your org on the auto-activation date. Test your <lightning:container> components in a Developer Edition org to verify that your <lightning:container> components still work without API access. If you must work in your production org, do so during off-peak hours.

To activate this critical update:

1. From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
2. For API Access for <lightning:container> Apps Is Revoked, click **Activate**.
3. Test the <lightning:container> components that previously used API access.

Component Library (Beta): View Unauthenticated Site, Custom Components, and Interface Documentation

Find all your components from your custom namespace and packages in one place. Interface documentation and code samples are also available now.

IN THIS SECTION:

[View the Component Library as an Unauthenticated Experience](#)

Previously, you can access the Component Library only as an authenticated experience within your orgs.

[View Lightning Component Resources in Custom Namespaces and Packages](#)

You can now find documentation for components, events, and interfaces, in your custom namespaces and packages in the Component Library (Beta).

[View Interface Documentation Beyond Attributes and Methods](#)

The Documentation tab provides more information about an interface.

View the Component Library as an Unauthenticated Experience

Previously, you can access the Component Library only as an authenticated experience within your orgs.

For an unauthenticated experience, go to <https://developer.salesforce.com/docs/component-library>. While you can view custom components specific to your org in the authenticated site, the unauthenticated site lists only components that are available out-of-the-box. Access the authenticated site at `https://<myDomain>.lightning.force.com/componentReference/suite.app` where <myDomain> is the name of your custom Salesforce domain.

View Lightning Component Resources in Custom Namespaces and Packages

You can now find documentation for components, events, and interfaces, in your custom namespaces and packages in the Component Library (Beta).

Resources—components, events, and interfaces—in custom namespaces display both global and non-global attributes and methods. Resources in managed and unmanaged packages display global attributes and methods only. By default, only the Specification tab is available for these resources. The Specification tab lists out the attributes and methods that are defined in the resource, such as the .cmp resource on a component.

To provide your own documentation in the Documentation tab for components in custom namespaces and packages, include an `auradoc` resource in your bundle. For more information, see the Lightning Components Developer Guide.

SEE ALSO:

[Lightning Components Developer Guide: Providing Component Documentation](#)

View Interface Documentation Beyond Attributes and Methods

The Documentation tab provides more information about an interface.

Previously, the Component Library displayed only the Specification tab for interfaces. You can now view documentation and code samples in the Documentation tab.

SEE ALSO:

[Lightning Components Developer Guide: Providing Component Documentation](#)

Validation for Component Attribute Types

The type of a component attribute is validated when you save the component. Validation at save time helps you discover attribute type errors earlier in your development process, instead of seeing errors at runtime. Save-time error messages for attribute type problems are also usually easier to review and understand.

Save time validation of component attribute types applies to components set to API version 42.0 or later.

Generally this change won't affect your existing code. In previous releases, most attribute type errors caused problems at runtime. Making attribute type errors something you see at save time just moves error discovery earlier. Either way, you have to fix them.

However, some attribute type errors—for example, using an Apex inner class as a component attribute type—don't cause errors at runtime. If you have a component with these kinds of errors, when you update the component to use API 42.0 or later, you won't be able to save changes to your component.

If you encounter this issue, you have two choices.

- Set the component to use API version 41.0 or earlier. Earlier API versions prevent the validation service from checking for attribute type errors.
- Fix your component to use a supported type for all attributes.

Example: Example Attribute Type Error

Attribute type validation errors fail with a `FIELD_INTEGRITY_EXCEPTION`.



SEE ALSO:

- [*Lightning Components Developer Guide: Custom Apex Class Types*](#)
- [*Lightning Components Developer Guide: Returning Data from an Apex Server-Side Controller*](#)
- [*Lightning Components Developer Guide: Validation When You Save Code Changes*](#)

Find Dynamically Created Components

You can now use `cmp.find()` to find a component that you create dynamically with `$A.createComponent()`.

In prior releases, a bug prevented `cmp.find()`, the standard method for finding a component, from working with dynamically created components. This bug has tripped up many people. Now, it just works as you would expect.

Action Overrides That Use Lightning Components Are Supported in Lightning Console Apps

Get ready for deeper control over what users see when viewing or editing a record or opening a list. Action overrides that use Lightning components for View, New, Edit, and Tab are now supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide. This feature is new in Lightning Experience.

SEE ALSO:

- [*Override Lightning Component Actions in Lightning Console Apps*](#)

<style> Tag Not Allowed in Components

You can't add a `<style>` tag in component markup or when you dynamically create a component in JavaScript code. This restriction ensures better component encapsulation and prevents component styling interfering with the styling of another component.

The `<style>` tag restriction applies to components with API version 42.0 or later.

Define component styles only in the style resource in a component bundle. All top-level elements in a component have a special `THIS` CSS class added to them. The `THIS` class effectively adds namespacing to CSS and prevents one component's CSS from overriding another component's styling.

SEE ALSO:

- [*Lightning Components Developer Guide: CSS in Components*](#)

Changes in Locker Service

The Locker Service architectural layer enhances security by isolating individual Lightning components in their own containers and enforcing coding best practices. The framework uses Content Security Policy (CSP) to control the source of content that can be loaded on a page. Locker Service compatibility is significantly improved in this release.

Behavior When Strict Content Security Policy is Enabled

Previously Locker Service used an iframe to isolate component code when strict Content Security Policy (CSP) was enabled. This approach caused problems when the Critical Update titled Enable Stricter Content Security Policy for Lightning Components was activated.

In this release, Locker Service eliminates the iframe so both framework and component code execute in the main window. Custom component code continues to be encapsulated by Locker Service and there is no change of Locker Service functionality.

Strict CSP can now be enabled with the critical update without issue. For more information, see [Critical Update for Stricter CSP Restrictions](#).

JavaScript Strict Mode

JavaScript strict mode is improved. For more information, see [JavaScript ES5 Strict Mode Enforcement](#)

Better Support for React Framework

Compatibility with React framework is improved.

New and Changed Lightning Components

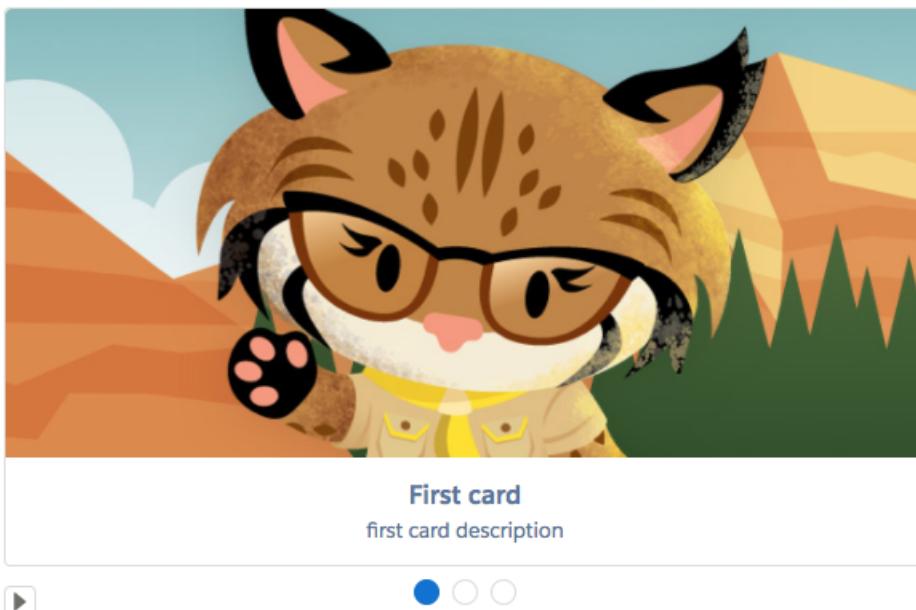
Build user interfaces quickly with a bevy of new components.

New Components

The following components are new and require API version 42.0 and later.

lightning:carousel (Beta)

A collection of images that are displayed horizontally one at a time.



lightning:formattedAddress

Displays a formatted address that provides a link to the given location on Google Maps.

[121 Spear St.](#)
[San Francisco, CA 94105](#)
[US](#)

lightning:formattedName

Displays a formatted name that can include a salutation and suffix.

[Mr. John Middleton Doe The 3rd Jo](#)

lightning:formattedTime

Displays a formatted time based on the user's locale.

[10:12:30 PM](#)

lightning:inputAddress

Represents an address compound field with support for street, city, province, postal code, and country.

* ADDRESS	
* Street	
121 Spear St.	
* City	* Province
San Francisco	CA
* PostalCode	Country
94105	US

lightning:inputField

An editable field with a label, help text, and value that corresponds to a field on a Salesforce object. This component must be nested in a `lightning:recordEditForm` component.

lightning:inputName

Represents a name compound field with support for salutation, first name, middle name, last name, informal name, and suffix.

Salutation
Mr.
First Name
John
Last Name
Doe

lightning:listView

Represents a list view of records that you own or have read or write access to, and records shared with you.

	NAME	TITLE	COMPANY	PHONE	M...	EMAIL	LEAD STAT...	OW...
1	Andy Young	SVP, Operat...	Dickenson ...	(620) 241...		a_young@...	Closed - Co...	DWidj
2	Jack Rogers	VP, Facilities	Burlington ...	(336) 222...		jrogers@bt...	Closed - Co...	DWidj

lightning:recordEditForm

A record edit or record create layout that displays one or more fields provided by `lightning:inputField`.

First Name
Andy

* Last Name
Young

Birthdate

Business Phone
(785) 241-6200

Lead Source ⓘ
Purchased List

Update record

lightning:pillContainer

A list of pills grouped in a container.

**lightning:treeGrid**

A hierarchical view of data presented in a table.

<input type="checkbox"/>	ACCOUNT NAME	EMPLOYEES	PHONE NUMBER	ACCOUNT OWNER
<input type="checkbox"/>	Rewis Inc	3,100	837-555-1212	Jane Doe
<input type="checkbox"/>	Acme Corporation	10,000	837-555-1212	John Doe
<input type="checkbox"/>	Acme Corporation (Bay Area)	3,000	837-555-1212	John Doe
<input type="checkbox"/>	Acme Corporation (Oakland)	745	837-555-1212	John Doe
<input type="checkbox"/>	Acme Corporation (San Francisco)	578	837-555-1212	Jane Doe

lightningsnapin:prechatAPI

Enables customization of the user interface for the pre-chat page in Snap-ins Chat.

Changed Components

The following components have changed.

lightning:buttonIcon

The following variant is new.

- `brand`—Creates an icon-only button with the blue Salesforce style.

lightning:buttonIconStateful

The following variant is new.

- `border-filled`—Creates an icon-only button with a white background.

lightning:comboBox

The following attribute has changed.

- `name`—This attribute is no longer required.

lightning:datatable

Text wrapping and clipping within a column is now supported. Text wrapping expands the height of the rows to reveal more content. Content is clipped by default if the number of characters is more than what the column width can hold. To toggle between the two views, select **Wrap text** or **Clip text** from the dropdown menu on the column header.

Other features that are now supported include:

- Appending icons to the header column
- Header-level actions
- Infinite loading of rows
- Row-level actions
- Selecting rows programmatically
- Using a button as a data type

These features are captured by the following lists of attributes, column properties, and data types.

The following attributes are new.

- `enableInfiniteLoading`—Enables or disables infinite loading. The default is false.
- `isLoading`—Specifies whether more data is being loaded, and displays a spinner if there is. The default is false.
- `loadMoreOffset`—Determines when to trigger infinite loading based on how many pixels the table's scroll position is from the bottom of the table. The default is 20.
- `selectedRows`—Enables programmatic row selection with a list of `keyField` values.
- `maxRowSelection`—Maximum number of rows that can be selected. Checkboxes are used for selection by default, and radio buttons are used when `maxRowSelection` is 1.
- `onheaderaction`—The action triggered when a header action is clicked. By default, it also closes the header actions menu.
- `onloadmore`—The action triggered when infinite loading loads more data.
- `onresize`—The action triggered when the table renders columns each time it resizes a column.
- `onrowaction`—The action triggered when a row action is clicked. By default, it also closes the row actions menu.
- `rowNumberOffset`—Determines where to start counting the row number. The default is 0.
- `showRowNumberColumn`—Shows or hides the row number column. Set to true to show the row number column. The default is false.

The following column properties are new.

- `actions`—Appends a dropdown menu of actions to a column.

- `cellAttributes`—Provides additional customization, such as appending an icon to the output. You can pass in these attributes: `iconName`, `iconLabel`, `iconPosition`.
- `iconName`—The Lightning Design System name of the icon. Names are written in the format `standard:opportunity`. The icon is appended to the left of the header label.

The following data types are now supported.

- `action`—Displays a dropdown menu using `lightning:buttonMenu` with actions as menu items. This data type supports these `typeAttributes` properties: `rowActions` and `menuAlignment`.
- `button`—Displays a button using `lightning:button`. This data type supports these `typeAttributes` properties: `disabled`, `iconName`, `iconPosition`, `label`, `name`, `title`, `variant`.

The `url` data type now supports the following `typeAttributes` property.

- `label`—The text to display in the link.

The date type now supports the following `typeAttributes` properties.

- `day`—Valid values are `numeric` and `2-digit`.
- `era`—Valid values are `narrow`, `short`, and `long`.
- `hour`—Valid values are `numeric` and `2-digit`.
- `hour12`—Determines whether the time is displayed as `12-hour`. If false, time displays as `24-hour`. The default setting is determined by the user's locale.
- `minute`—Valid values are `numeric` and `2-digit`.
- `month`—Valid values are `2-digit`, `narrow`, `short`, and `long`.
- `second`—Valid values are `numeric` and `2-digit`.
- `timeZone`—The time zone to use. Implementations can include any time zone listed in the IANA time zone database. The default is the runtime's default time zone. Use this attribute only if you want to override the default time zone.
- `timeZoneName`—Valid values are `short` and `long`. For example, the Pacific time zone displays as `PST` if you use `short` or `Pacific Standard Time` if you use `long`.
- `weekday`—Valid values are `narrow`, `short`, and `long`.
- `year`—Valid values are `numeric` and `2-digit`.

lightning:dualListbox

The following attribute has changed.

- `name`—This attribute is no longer required.

lightning:fileUpload

The following attribute is new and has changed since its initial release.

- `name`—Specifies the name of the input element. This attribute is no longer required.

lightning:flow

The `onstatuschange` attribute returns additional parameters.

- `activestages`—The current value of the `$Flow.ActiveStages` variable in the flow. (Flow stages are a beta feature.)
- `currentstage`—The current value of the `$Flow.CurrentStage` variable in the flow. (Flow stages are a beta feature.)
- `guid`—The interview's GUID.
- `helpText`—The help text for the current screen.

lightning:helptext

This component no longer requires version 41.0. It's now usable with any API version 37.0 and later.

lightning:input

The following attribute has changed.

- **formatter**—The `percent-fixed` formatter is new for `type="number"`. It displays your input value as is, for example, entering 10 results in 10%. Additionally, the percentage value is now rounded off to the last decimal point when the `step` value is provided. For example, when `step="0.001"` and a value of `0.12345` is provided with the `percent` formatter, you see `12.345%` instead of `12%` on blur. Similarly, when `step="0.001"` and a value of `12.3456` is provided with the `percent-fixed` formatter, you see `12.346%`.
- **name**—This attribute is no longer required.

lightning:inputRichText

The following attributes are new.

- **ariaLabel**—Label describing the rich text editor to assistive technologies.
- **ariaLabelledby**—An element ID that provides a label for the rich text editor.
- **ariaDescribedby**—A space-separated list of element IDs that provides descriptive labels for the rich text editor.

lightning:outputField

The following attribute is new.

- **class**—CSS class for the outer element, in addition to the component's base classes.

lightning:radioGroup

The following attribute has changed.

- **name**—This attribute is no longer required.

lightning:recordViewForm

The following attribute is new.

- **class**—CSS class for the outer element, in addition to the component's base classes.

lightning:select

The following attribute has changed.

- **name**—This attribute is no longer required.

lightning:textarea

The following attribute has changed.

- **name**—This attribute is no longer required.

lightning:verticalNavigation

The following attribute is new.

- **ariaLabel**—The `aria-label` attribute for the navigation component.

New and Changed Lightning Events

Lightning events facilitate communication between components and increase interactivity in your apps.

New Events

The following events are new.

Omni-Channel events

The Omni-Channel console events in the Salesforce Console Integration Toolkit are now available with Lightning Components. For more information, see [Salesforce Console APIs](#).

Changed Events

The following event has changed.

aura:locationChange

The critical update that enables a new URL format for Lightning Experience and the Salesforce mobile app changes how URLs impact navigation in an app. Changes to the hash fragment in a URL are central for navigation in the old URL format. The hash fragment is not as central for navigation with the new URL format.

The `aura:locationChange` tracks changes to the hash fragment in a URL. The event hasn't changed, but it's not useful for tracking navigation with the new URL format.

New and Changed Lightning Interfaces

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

New Interfaces

The following interfaces are new.

lightning:availableForFlowScreens

Enables a component to be used in a flow screen. For more information, see [Build Richer Flow Screens with Lightning Components](#).

lightningsnapin:prechatUI

Enables a component to be used as a custom Lightning page template for a Snap-ins Chat pre-chat page. For more information, see [Customize Pre-Chat with Lightning Components](#).

Changed Interfaces

The following interface has changed.

clients:hasItemContext

Provides a component access to email or calendar events in Lightning for Outlook and Lightning for Gmail, now with read and compose modes.

Visualforce: Lightning Experience Readiness

Develop apps to customize your org using Visualforce. Changes in this release focus on simplifying the migration of your Visualforce pages to Lightning Experience.

For more information on features affected by these enhancements, refer to the [Visualforce Developer's Guide](#).

IN THIS SECTION:

[Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

We're stabilizing the hostname of Visualforce, Community Builder, Site.com Studio, and content file URLs by removing instance names from URLs. This critical update applies to orgs that have a deployed My Domain. It will be activated automatically on March 16, 2019.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

[Enable the Lightning Console UI Theme \(Critical Update\)](#)

This critical update enables Lightning Console's exclusive UI Theme `Theme4u`, and will be activated automatically on October 5, 2018. Currently, `$User.UITheme` or `$User.UIThemeDisplayed` returns `Theme4d` for Visualforce pages in standard Lightning Experience apps and Lightning Console apps. Once the critical update is activated, Lightning Console apps return `Theme4u`, allowing Visualforce pages to differentiate between standard Lightning Experience apps and Lightning Console apps.

[Simplify Your Visualforce Lightning Experience Rollout](#)

The Lightning Experience Visualforce Report now gives you more information and recommendations to help you get your pages ready for Lightning Experience. The report identifies which of your Visualforce pages are overrides, tabs, embedded pages, or dashboard components. It also provides styling recommendations and next steps to take to give your Visualforce pages the look and feel of Lightning Experience. This change applies to both Lightning Experience and Salesforce Classic.

[<apex:slds> Supports Lightning Experience and Custom Styling](#)

The `<apex:slds>` component includes Lightning Design System stylesheets in Visualforce pages. In Spring '18, this component automatically adopts the latest Lightning Experience styling or your organization's custom theme. To apply this change to your Visualforce pages, update the page's API level to 42.0 or later. This feature is available in Lightning Experience and all versions of the Salesforce app.

[Detect the Lightning Console UI Theme in Visualforce Pages](#)

Your Visualforce pages can detect whether they're loaded in Lightning apps with console navigation versus Lightning apps with standard navigation. This feature is new in Lightning Experience.

Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files (Critical Update)

We're stabilizing the hostname of Visualforce, Community Builder, Site.com Studio, and content file URLs by removing instance names from URLs. This critical update applies to orgs that have a deployed My Domain. It will be activated automatically on March 16, 2019.

Prior to Winter '18, Visualforce, Community Builder, Site.com Studio, and content file URLs included the instance name of the org, even when a My Domain name was deployed. An instance name identifies where your Salesforce org is hosted.

When we remove the instance name from your URLs, your hostnames change.

Here are two examples:

- `mydomain--c.visualforce.com` replaces `mydomain--c.na1.visual.force.com`
- `mydomain--c.documentforce.com` replaces `mydomain--c.na1.content.force.com`

 **Note:** All `*.content.force.com` URLs will be replaced with `*.documentforce.com`.

After this update, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname.

This update might log out users who are accessing Visualforce, Community Builder, Site.com Studio, and content file URLs. To minimize disruption, consider activating this critical update during off-peak hours.

Editions

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Test This Critical Update

We recommend that you test this update in a sandbox to ensure that the new URLs work with firewalls and proxy servers in the network path between your users and Salesforce. Firewalls and proxy servers that filter by hostname must also trust the following:

- `*.visualforce.com`
- `*.documentforce.com`

- *.salesforce-communities.com

Enable the Lightning Console UI Theme (Critical Update)

This critical update enables Lightning Console's exclusive UI Theme `Theme4u`, and will be activated automatically on October 5, 2018. Currently, `$User.UITheme` or `$User.UIThemeDisplayed` returns `Theme4d` for Visualforce pages in standard Lightning Experience apps and Lightning Console apps. Once the critical update is activated, Lightning Console apps return `Theme4u`, allowing Visualforce pages to differentiate between standard Lightning Experience apps and Lightning Console apps.

Test This Critical Update

Before activating the critical update, code used to determine whether the Visualforce page is used in Lightning Experience needs alterations. For example, the following code must be changed:

```
function inLightningExperience () {
    return 'Theme4d' === {!$User.UIThemeDisplayed};
}
```

Instead, use the following code to determine whether the page is in Lightning Experience:

```
function inLightningExperience () {
    return ['Theme4d', 'Theme4u'].indexOf('!$User.UIThemeDisplayed') > -1;
}
```

SEE ALSO:

[Detect the Lightning Console UI Theme in Visualforce Pages](#)

Simplify Your Visualforce Lightning Experience Rollout

The Lightning Experience Visualforce Report now gives you more information and recommendations to help you get your pages ready for Lightning Experience. The report identifies which of your Visualforce pages are overrides, tabs, embedded pages, or dashboard components. It also provides styling recommendations and next steps to take to give your Visualforce pages the look and feel of Lightning Experience. This change applies to both Lightning Experience and Salesforce Classic.

We estimate how much time and effort our Visualforce recommendations require. Estimations are based on the average number of hours that specific Visualforce migration tasks take.

You can run the Visualforce Report directly from your Readiness Report PDF file. The report evaluates only the pages that have been accessed in the past 90 days.

SEE ALSO:

[Salesforce Help: Check Your Lightning Experience Readiness](#)

[Get Up to Date on Your Lightning Experience Readiness](#)

USER PERMISSIONS

To run the Lightning Experience Visualforce Report:

- Customize Application AND Modify All Data

To get the email with your Visualforce Report:

- In Salesforce Setup, Email Deliverability set to access level **All email**

<apex:slds> Supports Lightning Experience and Custom Styling

The `<apex:slds>` component includes Lightning Design System stylesheets in Visualforce pages. In Spring '18, this component automatically adopts the latest Lightning Experience styling or your organization's custom theme. To apply this change to your Visualforce pages, update the page's API level to 42.0 or later. This feature is available in Lightning Experience and all versions of the Salesforce app.

To configure themes, from Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**. You can choose between Salesforce built-in themes and custom themes you create with your own images and colors.

Here is a Visualforce page without the `<apex:slds>` updates.

This screenshot shows a Visualforce page for Opportunities. The header includes a crown icon, the word 'Opportunities', and the text 'Acme - 1,200 Widgets'. On the right, there are buttons for '+ Follow', 'Edit', 'Delete', 'Clone', and a dropdown arrow. Below the header, there are four data fields: 'Field 1' (Description that demonstrates t...), 'Field 2 (3) ▾' (Multiple Values), 'Field 3' (Hyperlink), and 'Field 4' (Description (2-line truncati...)). A horizontal navigation bar below the fields contains 'Details', 'Upgrade Plan', and 'Feed', with 'Details' being underlined. Underneath the navigation bar, there is a section labeled 'Same as Billing Address' with a checked checkbox and the word 'Enabled'. Another section labeled 'Scheduled Day(s)' shows a row of five days: Mon, Tue, Wed, Thu, and Fri, where Tuesday and Wednesday are highlighted in blue.

Here is a Visualforce page with the updated `<apex:slds>` component. Notice how the custom theme shows up in the header and buttons.

This screenshot shows the same Visualforce page as above, but with the `<apex:slds>` component applied. The visual style is updated according to the custom theme. The header now features a grey background with white text. The buttons for '+ Follow', 'Edit', 'Delete', 'Clone', and the dropdown arrow are styled with a blue gradient. The horizontal navigation bar has a red underline under 'DETAILS'. The 'Same as Billing Address' section and the 'Scheduled Day(s)' section remain the same, with Tuesday and Wednesday still highlighted in blue.

Only Lightning Design System components included by `<apex:slds>` are styled. See the Lightning Design System website for more information.

SEE ALSO:

[Lightning Design System](#)

[Show Your True Colors with Themes in Lightning Experience](#)

[Visualforce Developer Guide: <apex:slds> Component Reference](#)

Detect the Lightning Console UI Theme in Visualforce Pages

Your Visualforce pages can detect whether they're loaded in Lightning apps with console navigation versus Lightning apps with standard navigation. This feature is new in Lightning Experience.

Check for the `Theme4u` value in UI context detection logic in the console, for example, using the `$User.UITheme` and `$User.UIThemeDisplayed` global variables.

SEE ALSO:

[Visualforce Developer Guide: \\$User.UITheme and \\$User.UIThemeDisplayed](#)

[Enable the Lightning Console UI Theme \(Critical Update\)](#)

Custom Metadata: Easy-to-Use Referencing of Custom Metadata Type Records in Validation Rules (Pilot)

Expand the use of custom metadata types with easy-to-use declarative tools. These changes apply to both Lightning Experience and Salesforce Classic.

 **Note:** We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

IN THIS SECTION:

[Employ Validation Rule Formulas with Custom Metadata Types \(Pilot\)](#)

If you use validation rules, you know how helpful they can be, but you have to hard code some of the values. Now you can store values you previously had to hard code in custom metadata types and reference them in your validation rules.

[Easily Insert Fields in Custom Metadata Types \(Pilot\)](#)

The Insert Field dialog brings ease to referencing custom metadata type records, and no coding is necessary.

Employ Validation Rule Formulas with Custom Metadata Types (Pilot)

If you use validation rules, you know how helpful they can be, but you have to hard code some of the values. Now you can store values you previously had to hard code in custom metadata types and reference them in your validation rules.

 **Example:** Use a validation rule formula to limit discounts on certain brands to 10%. You can use validation rules without custom metadata. However, to change an amount, you must update the hardcoded value. If you have multiple validation rules that check the discount amount, you have to manage all of them. Instead, use a validation rule formula with custom metadata types.

1. Create a custom metadata type. In this example, we named it `DiscountLimits`.
2. Create a custom field for your type. We named it `maxDiscount`.
3. Create a record. We named it `FoodDiscount`.

When done, you can reference the custom metadata type in your validation rule. The syntax is:

```
$CustomMetadata.CustomMetadataTypeAPIName.RecordAPIName.FieldAPIName
```

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Professional Edition orgs can create, edit, and delete custom metadata records only from types in installed packages.

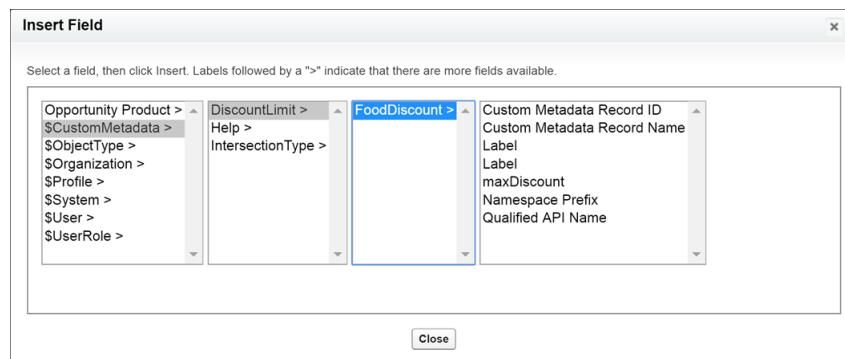
Make sure to use the correct suffixes. For the custom metadata type, use `__mdt`. For fields, use `__c`. Records require no suffix. Your validation rule for this example looks something like this:

```
Discount > $CustomMetadata.DiscountLimits__mdt.FoodDiscount.maxDiscount__c
```

Easily Insert Fields in Custom Metadata Types (Pilot)

The Insert Field dialog brings ease to referencing custom metadata type records, and no coding is necessary.

 **Example:** To insert a field named `maxDiscount` from a custom metadata type named `DiscountLimits`, in the Insert Field dialog select `$CustomMetadata >` and make your selection.



Apex: Platform Cache in Lightning and New Methods

Apex is a programming language that uses Java-like syntax and acts like database stored procedures. Apex enables developers to add business logic to system events, such as button clicks, updates of related records, and Visualforce pages.

For more information on these enhancements, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[Platform Cache: Now Available in Lightning](#)

You can now use Platform Cache in Lightning Experience and Salesforce Classic. Previously, only Salesforce Classic was supported. Using Platform Cache can significantly improve the performance of your applications.

[Apex: New and Changed Classes](#)

These classes are new or have changed.

[ConnectApi \(Chatter in Apex\): New and Changed Classes and Enums](#)

Create custom experiences in Salesforce using Chatter in Apex. You now can get up to 100 comments at a time, get lists of users who voted on posts or comments, and purge users' Chatter-related activities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Platform Cache: Now Available in Lightning

You can now use Platform Cache in Lightning Experience and Salesforce Classic. Previously, only Salesforce Classic was supported. Using Platform Cache can significantly improve the performance of your applications.

SEE ALSO:

https://help.salesforce.com/articleView?id=data_platform_cache.htm

Apex: New and Changed Classes

These classes are new or have changed.

IN THIS SECTION:

[Changed Apex Classes](#)

These existing classes have new or changed methods or constants.

Changed Apex Classes

These existing classes have new or changed methods or constants.

Auth.SessionManagement Class

New Methods

finishLoginFlow()

Finish the Visualforce Page login flow process, and redirect the user to the default home page.

finishLoginFlow(startUrl)

Finish the Visualforce Page login flow process, and redirect the user to the specified start URL.

Database.LeadConvert Class

New Method

setOpportunityId(opportunityId)

Sets the ID of the opportunity into which the lead is merged. This value is required only when updating an existing opportunity.

Flow.Interview Class

The Interview object now supports namespaced flows with this format: `Flow.Interview.namespace.flowName`.

New Methods

createInterview(flowName, inputVariables)

Creates an interview for a flow.

createInterview(namespace, flowName, inputVariables)

Creates an interview for a namespaced flow.

Messaging.SingleEmailMessage Class

New Method

getTemplateName()

Returns the name of the template used to create the email.

Metadata.AnalyticsCloudComponentLayoutItem Class**New Property****showHeader**

If `true`, includes the dashboard's header bar. If `false`, the dashboard appears without a header bar.

Metadata SidebarComponent Class**New Properties****createAction**

If the component is a lookup field, the name of the quick action used to create a record.

enableLinking

If the component is a lookup field, lets users associate a record with this field.

updateAction

If the component is a lookup field, the name of the quick action used to update a record.

System.List Class**New Methods****contains(listElement)**

Returns `true` if the list contains the specified element.

indexOf(listElement)

Returns the index of the first occurrence of the specified element in this list. If this list does not contain the element, returns `-1`.

System.PageReference Class**New Method****renderStoredEmailTemplate(templateId, whoId, whatId, attachmentRetrievalOption, updateEmailTemplateUsage)**

A new override of this method, which contains a new parameter, `updateEmailTemplateUsage`. This parameter specifies whether the usage field in the EmailTemplate record is updated upon successful rendering.

ConnectApi (Chatter in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Chatter in Apex. You now can get up to 100 comments at a time, get lists of users who voted on posts or comments, and purge users' Chatter-related activities.

Many Chatter REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Chatter in Apex*.

In Apex, you can access some Chatter data using SOQL queries and objects. However, `ConnectApi` classes expose Chatter data in a much simpler way. Data is localized and structured for display. For example, instead of making many calls to access and assemble a feed, you can do it with a single call.



Note: To integrate mobile apps, intranet sites, and third-party web applications with Chatter and Communities, use [Chatter REST API](#).

IN THIS SECTION:[New and Changed Chatter in Apex Classes](#)

These classes are new or changed this release.

[New and Changed Chatter in Apex Input Classes](#)

These input classes are new or changed this release.

[New and Changed Chatter in Apex Output Classes](#)

These output classes are new or changed this release.

[New and Changed Chatter in Apex Enums](#)

These enums are new or changed this release.

New and Changed Chatter in Apex Classes

These classes are new or changed this release.

Chatter Feeds

These new and changed methods are in the `ConnectApi.ChatterFeeds` class. Unless noted as existing, these methods are new.

Get link metadata for URLs

- `getLinkMetadata(communityId, urls)`

Get up to 100 comments

- `getCommentBatch(communityId, commentIds)`

Get a list of users who upvoted or downvoted a feed post

- `getVotesForFeedElement(communityId, feedElementId, vote)`
- `getVotesForFeedElement(communityId, feedElementId, vote, pageParam, pageSize)`

Get a list of users who upvoted or downvoted a comment

- `getVotesForComment(communityId, commentId, vote)`
- `getVotesForComment(communityId, commentId, vote, pageParam, pageSize)`

Post a comment with an existing knowledge article attachment

Use this existing method with the new `ConnectApi.RecordCapabilityInput`.

- `postCommentToFeedElement(communityId, feedElementId, comment, feedElementFileUpload)`

Get the top-five unanswered questions for the context user in a community (pilot)

- `getTopUnansweredQuestions(communityId) (Pilot)`
- `getTopUnansweredQuestions(communityId, filter) (Pilot)`
- `getTopUnansweredQuestions(communityId, pageSize) (Pilot)`
- `getTopUnansweredQuestions(communityId, filter, pageSize) (Pilot)`

These methods have matching set test methods.



Note: We provide top-five unanswered questions to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Top five unanswered questions isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Managed Topics

These changed methods are in the `ConnectApi.ManagedTopics` class.

Get up to eight levels of managed topics

Previously, these methods returned up to three levels of topics. Now you can specify a `depth` of 1–8.

- `getManagedTopic(communityId, managedTopicId, depth)`
- `getManagedTopics(communityId, managedTopicType, depth)`
- `getManagedTopics(communityId, managedTopicType, recordIds, depth)`

Users

These new methods are in the `ConnectApi.ChatterUsers` class.

Export Chatter-related activities for a user

- `exportUserActivities(communityId, userId)`

Purge Chatter-related activities for a user

- `purgeUserActivities(communityId, userId)`

New and Changed Chatter in Apex Input Classes

These input classes are new or changed this release.

Chatter Feeds

`ConnectApi.CommentCapabilitiesInput`

This input class has these new properties.

- `feedEntityShare`—Feed entity to share to the comment.
- `record`—Existing knowledge article to attach to the comment.

`ConnectApi.ExtensionsCapabilityInput`

This input class has this new property.

- `itemsToRemove`—List of attachment IDs to remove from the feed element.

`ConnectApi.PinCapabilityInput`

This new input class has these properties.

- `entityId`—ID of the entity to pin or unpin. In version 41.0 and later, `entityId` must be a feed item ID, and only one feed item can be pinned per feed.
- `isPinned`—Specifies whether to pin (`true`) or unpin (`false`) the entity.

`ConnectApi.RecordCapabilityInput`

This new input class is a subclass of `ConnectApi.FeedElementCapabilityInput`. It has one property.

- `recordId`—ID of the existing knowledge article to attach.

New and Changed Chatter in Apex Output Classes

These output classes are new or changed this release.

Chatter Feeds

ConnectApi.CommentCapabilities

This output class has these new properties.

- `feedEntityShare`—If a comment has this capability, a feed entity is shared with it.
- `record`—If a comment has this capability, it has a record attachment.

ConnectApi.Feed

This output class has these new properties.

- `redirectedFeedFilter`—Filter for the feed specified in `redirectedFeedType`. Otherwise, `null`.
- `redirectedFeedSort`—Sort order for the feed specified in `redirectedFeedType`. Otherwise, `null`.

ConnectApi.LinkMetadata

This new output class has these properties.

- `description`—Description of the link.
- `frameSource`—HTML required to display the resource.
- `height`—Height required to display the HTML.
- `originalUrl`—Original URL that was used to request the metadata.
- `providerUrl`—URL of the provider that the information is retrieved from.
- `source`—Source of the link metadata. Values are:
 - `None`—Link metadata wasn't retrieved.
 - `Sfdc`—Salesforce is the source.
- `thumbnailUrl`—Thumbnail of the resource.
- `title`—Title of the link.
- `type`—Type of link that the metadata represents. Values are:
 - `Error`—Link metadata couldn't be retrieved.
 - `Link`—Represents a link.
 - `None`—Link metadata wasn't retrieved because the link isn't a whitelisted domain.
 - `Photo`—Represents a photo.
 - `Rich`—Represents rich content, typically HTML content.
 - `Unknown`—Link metadata was retrieved, but the type is unknown.
 - `Video`—Represents a video.
- `url`—URL of the image to display, if one is available.
- `width`—Width required to display the HTML.

ConnectApi.LinkMetadataCollection

This new output class has this property.

- `linkMetadataList`—List of metadata for links.

ConnectApi.RecordCapability

This new output class is a subclass of `ConnectApi.FeedElementCapability`. It has these properties.

- `recordId`—ID of the record.
- `url`—URL to the record.

ConnectApi.Vote

This new output class has these properties.

- **type**—Type of vote for a feed element or comment. Values are:
 - Down
 - Up
- **user**—User who voted on the feed element or comment.
- **votedItem**—Reference to the feed element or comment that was voted on.

ConnectApi.VoteCollection

This new output class has these properties.

- **currentPageToken**—Token identifying the current page.
- **currentPageUrl**—Chatter REST API URL identifying the current page.
- **items**—Collection of users and their upvotes or downvotes.
- **nextPageToken**—Token identifying the next page, or `null` if there isn't a next page.
- **nextPageUrl**—Chatter REST API URL identifying the next page, or `null` if there isn't a next page.
- **previousPageToken**—Token identifying the previous page, or `null` if there isn't a previous page.
- **previousPageUrl**—Chatter REST API URL identifying the previous page, or `null` if there isn't a previous page.
- **total**—Total number of upvotes or downvotes for the feed element or comment.

Users

ConnectApi.BookmarkSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.ChatterActivitySummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has these properties.

- **commentCount**—Total number of comments in the org or community made by the user.
- **commentReceivedCount**—Total number of comments in the org or community received by the user.
- **likeReceivedCount**—Total number of likes on posts and comments in the org or community received by the user.
- **postCount**—Total number of posts in the org or community made by the user.

ConnectApi.CommentSummary

This new output class is a subclass of `ConnectApi.UserActivitySummary`. It has one property.

- **commentId**—ID of the comment.

ConnectApi.CompanyVerifySummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.DownVoteSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.FeedEntityReadSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.FeedPostSummary

This new output class is a subclass of `ConnectApi.UserActivitySummary`. It has one property.

- **feedItemId**—ID of the post.

ConnectApi.FeedReadSummary

This new output class is a subclass of `ConnectApi.UserActivitySummary`. It has these properties.

- `containerId`—ID of the parent of the feed.
- `feedType`—Type of feed.

ConnectApi.LikeSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has one property.

- `likeId`—ID of the like.

ConnectApi.MuteSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.TopicEndorsementSummary

This new output class is a subclass of `ConnectApi.UserActivitySummary`. It has one property.

- `endorsementId`—ID of the topic endorsement.

ConnectApi.UpVoteSummary

This new output class is a subclass of `ConnectApi.UserFeedEntityActivitySummary`. It has no additional properties.

ConnectApi.UserActivitiesJob

This new output class has these properties.

- `jobToken`—Token that identifies the user activities job.
- `jobType`—Type of user activities job. Value is `export` or `purge`.
- `message`—Message describing the status and expected outcome of the job.

ConnectApi.UserActivityCollection

This new output class has these properties.

- `activityType`—Type of user activity.
- `userActivities`—Collection of user activities.

ConnectApi.UserActivitySummary

This new output class is abstract and is a superclass of:

- `ConnectApi.CommentSummary`
- `ConnectApi.FeedPostSummary`
- `ConnectApi.FeedReadSummary`
- `ConnectApi.UserFeedEntityActivitySummary`

It has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.

ConnectApi.UserFeedEntityActivitySummary

This new output class is abstract and is a subclass of `ConnectApi.UserActivitySummary`. It's a superclass of:

- `ConnectApi.BookmarkSummary`
- `ConnectApi.DownVoteSummary`
- `ConnectApi.FeedEntityReadSummary`
- `ConnectApi.LikeSummary`

- `ConnectApi.MuteSummary`
- `ConnectApi.UpVoteSummary`

It has one property.

- `feedEntityId`—ID of the feed entity.

New and Changed Chatter in Apex Enums

These enums are new or changed this release.

For information about these enums, see ConnectApi Enums in *Apex Developer Guide*.

ConnectApi.FeedElementCapabilityType

This enum has one new value.

- `Record`—The comment has a record attachment.

ConnectApi.LinkMetadataSource

This new enum has these values.

- `None`—Link metadata wasn't retrieved.
- `Sfdc`—Salesforce is the source.

ConnectApi.LinkMetadataType

This new enum has these values.

- `Error`—Link metadata couldn't be retrieved.
- `Link`—Represents a link.
- `None`—Link metadata wasn't retrieved because the link isn't a whitelisted domain.
- `Photo`—Represents a photo.
- `Rich`—Represents rich content, typically HTML content.
- `Unknown`—Link metadata was retrieved, but the type is unknown.
- `Video`—Represents a video.

ConnectApi.UserActivityType

This new enum has these values.

- `Bookmark`—User bookmarked a post.
- `ChatterActivity`—Total counts of posts and comments made and likes and comments received for a user.
- `ChatterLike`—User liked a post or comment.
- `Comment`—User commented on a post.
- `CompanyVerify`—User verified comment.
- `DownVote`—User downvoted a post or comment.
- `FeedEntityRead`—User read a post.
- `FeedRead`—User read a feed.
- `Mute`—User muted a post.
- `Post`—User made a post.
- `TopicEndorsement`—User endorsed another user on a topic or received endorsement on a topic.
- `UpVote`—User upvoted a post or comment.

API

Access more metadata types and data objects in API version 42.0.

EDITIONS

IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[SOQL](#)

Salesforce Object Query Language (SOQL) includes updates to the FOR REFERENCE and FOR VIEW.

[REST API](#)

REST API includes a new composite resource, SObject Collections. REST API composite resources improve your application's performance by minimizing the number of round-trips between the client and server.

[SOAP API](#)

SOAP API includes new, changed, and deprecated calls.

[Chatter REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. You now can get up to 100 comments at a time, get lists of users who voted on posts or comments, and purge users' Chatter-related activities.

[Reports and Dashboards REST API](#)

Reports and Dashboards REST API enhancements include new methods of report and dashboard folders, a URL parameter for the notifications resource to scope resources to Lightning dashboard subscriptions, new resources for report types, and new report and dashboard properties.

[User Interface API](#)

Build Salesforce UI for native mobile apps and custom web apps using the same API that Salesforce uses to build Lightning Experience and Salesforce for Android, iOS, and mobile web. Now you can get a directory of supported objects and build UI for picklists, dependent picklists, and lists.

[Tooling API](#)

Tooling API includes new and changed objects.

[Metadata API](#)

Metadata API includes new and changed types and fields.

[Data Services: Compliance Enhancements and Delete Permissions](#)

New delete permissions and capabilities are available for custom big objects and Field Audit Trail.

[Salesforce Console APIs](#)

We made enhancements to the Salesforce Console Integration Toolkit and to the Salesforce Lightning Console JavaScript APIs. Many of the Salesforce Classic methods used in existing Visualforce pages and third-party web tabs now work in Lightning Experience. Visualforce pages can detect whether they're loaded in the UI theme for Lightning apps with console navigation versus the UI theme for Lightning apps with standard navigation. Lightning console apps now support using web tabs with third-party domains so that users can access web applications or other websites from within the application. The Omni-Channel methods in the Lightning JavaScript APIs are generally available, and console events have been added. These changes are new to Lightning Experience.

New and Changed Objects

Access more data through these new and changed standard objects.

IN THIS SECTION:

[New Objects](#)

These objects are new.

[Changed Objects](#)

These objects have changed.

New Objects

These objects are new.

ContentDocumentSubscription

Represents a subscription for a user following or commenting on a file in a library.

ContentNotification

Represents a notification for a file.

ContentTagSubscription

Represents a subscription for a user following a tag on a file.

ContentUserSubscription

Represents a subscription for a user following another user.

ContentVersionComment

Represents a comment on a version of a file.

ContentVersionRating

Represents a rating on a version of a file.

ContentWorkspaceSubscription

Represents a subscription for a user following a library.

DataIntegrationRecordPurchasePermission

Indicates Lightning Data purchase credits that a Salesforce admin has granted to users.

DuplicateJob

Represents an instance of a job that identifies duplicates among existing records in the system.

DuplicateJobDefinition

Setup object defining a job that identifies duplicate record items globally.

DuplicateJobMatchingRule

Represents a MatchingRule to be used with a DuplicateJob sharing the corresponding DuplicateJobMatchingRuleDefinition.

DuplicateJobMatchingRuleDefinition

Setup object specifying a MatchingRule to use with DuplicateJob instances that share a DuplicateJobDefinition.

Individual

Represents a customer's data privacy and protection preferences. Data privacy records based on the Individual object store customers' privacy preferences and are associated with a lead or a contact.

FlowRecordRelation

Represents a relationship between a record and a flow interview. When a flow interview is paused, Salesforce uses the \$Flow.CurrentRecord system variable in the flow to associate the interview with a record.

NetworkUserHistoryRecent

Represents a community user's history of accessed records.

OrgDeleteRequest

Represents a request to delete a developer edition (DE) org.

ReturnOrder

Represents the return or repair of inventory or products in field service.

ReturnOrderFeed

Represents a single feed item on a return order record detail page.

ReturnOrderHistory

Represents the history of changes made to tracked fields on a return order.

ReturnOrderLineItem

Represents a specific product that is returned or repaired as part of a return order in field service.

ReturnOrderLineItemFeed

Represents a single feed item on a return order line item record detail page.

ReturnOrderLineItemHistory

Represents the history of changes made to tracked fields on a return order line item.

ReturnOrderOwnerSharingRule

Represents the rules for sharing a return order with user records other than the owner or anyone above the owner in the role hierarchy.

ReturnOrderShare

Represents a sharing entry on a return order.

Survey

Represents a survey.

SurveyEmailBranding

Represents the configuration settings for invitation emails sent to survey participants for a particular survey.

SurveyFeed

Represents a single item in the feed displayed on the detail page for the Survey object.

SurveyInvitation

Represents the invitation sent to a participant to complete the survey.

SurveyInvitationShare

Represents a sharing entry on a SurveyInvitation object.

SurveyPage

Represents a page, such as the title page or a question page, in a survey.

SurveyQuestion

Represents a question in a survey.

SurveyQuestionChoice

Represents an answer choice that a participant can select for a survey question.

SurveyQuestionResponse

Represents a participant's answer to a specific question.

SurveyResponse

Represents information about a participant's response to a survey, such as the status of the response, the participant's location, and when the survey was completed.

SurveyShare

Represents a sharing entry on a Survey object.

SurveyVersion

Represents a version of a survey.

TopicUserEvent

Represents an action (such as comment, post, like, or share) made by a user on a topic.

Changed Objects

These objects have changed.

Changed Objects**Account**

A new field, `PersonIndividualId`, was added.

Campaign

A new field, `CampaignImageId`, was added.

ChatterMessage

Supported calls include `update()`, and the `Body` field has a new `Update` property.

ContentAsset

A new field, `isVisibleByExternalUsers`, was added.

DuplicateRecordSet

One new field was added: `ParentId`.

EmbeddedServiceDetail

The following fields were added:

- `CustomPrechatComponent`
- `IsLiveAgentEnabled`

EmailServicesAddress

A new field was added: `DeveloperName`.

EmailServicesFunction

The picklist values on the following fields have been changed from numeric values to strings: `AddressInactiveAction`, `AttachmentOption`, `AuthenticationFailureAction`, `AuthorizationFailureAction`, `FunctionInactiveAction`, and `OverLimitAction`.

The `IsTlsRequired` field is not currently in use.

EntityMilestone

- A new field, `slaProcessId`, was added
- On the `TimeRemainingInDays` field, filterable was changed to true and groupable was changed to false
- On the `TimeRemainingInHrs` field, filterable was changed to true
- On the `TimeSinceTargetInDays` field, filterable was changed to true and groupable was changed to false
- On the `TimeSinceTargetInHrs` field, filterable was changed to true

EventLogFile

The following fields were added to support the Hourly Event Monitoring beta. They were previously exposed in API v.37.0 on a pilot basis only.

- `Interval` – The generation schedule for the event log file. Possible values are:
 - `Daily`
 - `Hourly`

- **Sequence** – The number for the portion of the event log file data captured in an hour. For 24-hour event log file generation, the value of this field is 0. For hourly event log file generation, the initial value is 1 and increases by 1 when events are added in the same hour after the latest event log file is created. The value resets to 1 in the subsequent hour. For example, you have activity between 2:00 and 3:00 PM. Two log files are generated that contain the event log data for that hour, with `Sequence` values of 1 and 2. For event log data that occurs at 3:01 PM, the `Sequence` value resets to 1.

In the Document Attachment Downloads event type, the `FILE_NAME` field was removed.

Fields for the External Cross-Org Callout, External Custom Apex Callout, and External OData Callout event types were added and changed. See [Track External Object Data Callouts with Event Log Files \(Pilot\)](#).

A new event type, Insecure External Assets, was added. See [Track Insecure External Assets with Event Log Files](#).

In the Knowledge Article View event type, the `USERNAME` field was removed.

In the Logout event type, the `USER_NAME` field was removed.

In the Time-Based Workflow event type, the following fields were added.

- `LOGIN_KEY`—The string that ties together all events in a given user's login session. It starts with a login event and ends with either a logout event or the user session expiring.
- `SESSION_KEY`—The user's unique session ID. You can use this value to identify all user events within a session. When a user logs out and logs in again, a new session is started.

FieldHistoryArchive

A new field, `HistoryId`, was added.

FlowInterviewOwnerSharingRule

If a user has Edit access to a FlowInterview, that user can resume the interview. To restrict who can resume an interview, disable **Let users resume shared flow interviews** in your org's Process Automation settings.

FlowInterviewShare

If a user has Edit access to a FlowInterview, that user can resume the interview. To restrict who can resume an interview, disable **Let users resume shared flow interviews** in your org's Process Automation settings.

ListEmail

The value Canceled was added to the `status` field.

LoginEvent

A new field, `EventIdentifier`, was added. It replaces the `UniqueKey` field, which was removed.

ProductTransfer

Two new fields were added: `ReturnOrderId` and `ReturnOrderLineItemId`.

RecentlyViewed

Clarified that RecentlyViewed data is retained for 90 days, after which the data is removed on a periodic basis. You can always export the RecentlyViewed data to save it.

ThirdPartyAccountLink

Added that you can make this object writable for Salesforce admins by contacting Salesforce Customer Support. With this feature, you can easily add or delete third-party account links using the API, but you can't update existing account links.

User

These new fields were added:

- `UserPreferencesSuppressEventSFXReminders`
- `UserPreferencesSuppressTaskSFXReminders`

These fields correspond to the **Show event reminders in Lightning Experience** and **Show task reminders in Lightning Experience** options on the Activity Reminders page in the user interface.

UserPreference

This object has new usage. Admin users can create and edit preferences for other users. Standard users can delete only their own preferences. For a standard user, the value of the `UserId` field must be the user's `UserId`.

WorkOrder

Two new fields were added: `ReturnOrderId` and `ReturnOrderLineItemId`.

WorkOrderLineItem

Two new fields were added: `ReturnOrderId` and `ReturnOrderLineItemId`.

SEE ALSO:

[Track Insecure External Assets with Event Log Files](#)

[Track User Actions in Time-Based Workflows More Comprehensively](#)

SOQL

Salesforce Object Query Language (SOQL) includes updates to the FOR REFERENCE and FOR VIEW.

Changed Clauses

FOR REFERENCE and FOR VIEW

Clarified that `RecentlyViewed` data is retained for 90 days, after which the data is removed on a periodic basis. You can always export the `RecentlyViewed` data to save it.

REST API

REST API includes a new composite resource, SObject Collections. REST API composite resources improve your application's performance by minimizing the number of round-trips between the client and server.

IN THIS SECTION:

[New Resource: Fewer Round-Trips with SObject Collections](#)

You now can take action on multiple records belonging to the same sObject type in a single request. By grouping operations by object type, you reduce the number of round-trips between client and server.

New Resource: Fewer Round-Trips with SObject Collections

You now can take action on multiple records belonging to the same sObject type in a single request. By grouping operations by object type, you reduce the number of round-trips between client and server.

 **Note:** SObject Collections aren't currently supported in composite requests.

Create or Update Records

Use a POST request to add up to 200 records or a PATCH request to update up to 200 records, returning a list of SaveResult objects. You can choose to roll back the entire request if there are errors.

If the request body includes objects of more than one type, they are processed as chunks. For example, if the incoming objects are `{account1, account2, contact1, account3}`, the request is processed in three chunks: `{ {account1, account2}, {contact1}, {account3} }`. A single request can process up to 10 chunks.

```
/vXX.X/composite/sobjects
```



Note: Creating records for multiple object types in one call isn't supported when an object type is related to a feature in the Setup area in Salesforce.

Retrieve Records

Use a GET request to retrieve one or more records of the same object type, specified by ID. You can specify approximately 800 IDs before the URL length causes the HTTP 414 error `URI too long` to be returned.

```
/vXX.X/composite/sobjects/sobjectType?ids=recordId, recordId&fields=fieldname,fieldname
```

To retrieve more records than the URL length can accommodate, use a POST request to retrieve up to 2000 records of the same object type. If you use POST, the IDs and fields of the records to retrieve are specified in the request body.

Delete Records

Use a DELETE request to delete up to 200 records, specified by ID, returning a list of DeleteResult objects. The objects in a DELETE request can belong to more than one object type. You can choose to roll back the entire request if there are errors.

```
/vXX.X/composite/sobjects/?ids=recordId, recordId
```

SOAP API

SOAP API includes new, changed, and deprecated calls.

New, Changed, and Deprecated Calls

New Calls

deleteByExample()

The `deleteByExample()` call deletes big object data. Define an sObject that contains the fields in the big object's index, with the values you want to target. The sObject acts like a template, and all rows that match the sObject's fields and values are deleted.

match()

Evaluates sObjects provided as an input for matches among Leads, using the matching rule specified in the input MatchOptions.

Changed Calls

describeSObjects() DescribeSObjectResult

The `formFactor` field in the ActionOverride subtype now supports the `Small` value, which represents the Salesforce mobile app on a phone or tablet.

search() SearchResult

The `search()` call returns a `SearchResult` object. The `SearchResult` object was updated to include a new `searchPromoted` parameter in `SearchPromotedMetadata`, which indicates that an article was promoted in search results. Admins define promoted search terms by adding to knowledge articles. Users who search for these keywords see the article first in search results. The related parameter `searchPromotedMetadata` was also added to `EntitySearchMetadata`.

Chatter REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. You now can get up to 100 comments at a time, get lists of users who voted on posts or comments, and purge users' Chatter-related activities.



Note: To create custom Chatter and communities experiences in Salesforce, use [ConnectApi \(Chatter in Apex\): New and Changed Classes and Enums](#).

IN THIS SECTION:

[New and Changed Chatter REST API Resources](#)

These resources are new or changed this release.

[New and Changed Chatter REST API Request Bodies](#)

These request bodies are new or changed this release.

[New and Changed Chatter REST API Response Bodies](#)

These response bodies are new or changed this release.

New and Changed Chatter REST API Resources

These resources are new or changed this release.

Chatter

Get link metadata for URLs

Make a GET request to the new `/chatter/link-metadata` resource with the `urls` parameter.

Chatter Feeds

Get up to 100 comments

Make a GET request to the new `/chatter/comments/batch/` resource, where `commentIds` is a comma-separated list of up to 100 comments.

Get a list of users who upvoted or downvoted a feed post

Make a GET request to the new `/chatter/feed-elements//capabilities/up-down-vote/items` resource with the `vote` parameter.

Get a list of users who upvoted or downvoted a comment

Make a GET request to the new `/chatter/comments//capabilities/up-down-vote/items` resource with the `vote` parameter.

Post a comment with an existing knowledge article attachment

Make a POST request to the existing `/chatter/feed-elements//capabilities/comment/items` resource with the new Record Capability Input.

Get the top-five unanswered questions for the context user in a community (pilot)

Make a GET request to the new `/connect/communities//question-and-answers/top-unanswered` resource.



Note: We provide top-five unanswered questions to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Top five unanswered questions isn't generally available unless or until Salesforce

announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Data Integration

Get external object names

Make a GET request to the new `/data-integration/licensed-objects` resource.

Get credit details for a contract

Make a GET request to the new `/data-integration/licensed-objects/externalObjectName/contracts/current` resource.

Duplicate Management

Get a directory of duplicate resources

Make a GET request to the new `/dedupe` resource.

Get duplicate job definitions

Make a GET request to the new `/dedupe/job-definitions` resource.

Get a duplicate job definition

Make a GET request to the new `/dedupe/job-definitions/jobDefinitionId` resource.

Get duplicate jobs

Make a GET request to the new `/dedupe/jobs` resource.

Run a duplicate job

Make a POST request to the new `/dedupe/jobs` resource with the new Duplicate Job Input.

Get a duplicate job

Make a GET request to the new `/dedupe/jobs/jobId` resource.

Update the status of a duplicate job

Make a PATCH request to the new `/dedupe/jobs/jobId` resource with the new Duplicate Job Status Input.

Delete duplicate job results

Make a DELETE request to the new `/dedupe/jobs/jobId/results` resource.

Files

Get the streamed content of an asset file

Make a GET request to the new `/connect/file-assets/fullyQualifiedFileName/content` resource.

Get the streamed rendition of an asset file

Make a GET request to the new `/connect/file-assets/fullyQualifiedFileName/rendition` resource.

Managed Topics

Get up to eight levels of managed topics

Previously, these resources returned up to three levels of topics. Now you can set a `depth` parameter of 1–8.

- `/connect/communities/communityId/managed-topics`
- `/connect/communities/communityId/managed-topics/managedTopicId`

Users

Export Chatter-related activities for a user

Make a POST request to the new /chatter/users/**userId**/activities/export-job resource.

Purge Chatter-related activities for a user

Make a POST request to the new /chatter/users/**userId**/activities/purge-job resource.

 **Note:** For these resources, POST takes no request parameters nor a request body.

New and Changed Chatter REST API Request Bodies

These request bodies are new or changed this release.

Chatter Feeds

Comment Capabilities Input

This request body has these new properties.

- `feedEntityShare`—Feed entity to share to the comment.
- `record`—Existing knowledge article to attach to the comment.

Extensions Capability Input

This request body has this new property.

- `itemsToRemove`—List of attachment IDs to remove from the feed element.

Pin Capability Input

This new request body has these properties.

- `entityId`—ID of the entity to pin or unpin. In version 41.0 and later, `entityId` must be a feed item ID, and only one feed item can be pinned per feed.
- `isPinned`—Specifies whether to pin (`true`) or unpin (`false`) the entity.

Record Capability Input

This new request body has one property.

- `recordId`—ID of the existing knowledge article to attach.

Duplicate Management

Duplicate Job Input

This new request body has one property.

- `duplicateJobDefId`—ID of the duplicate job definition.

Duplicate Job Status Input

This new request body has one property.

- `status`—Status of the duplicate job. `Canceled` is the only valid value.

New and Changed Chatter REST API Response Bodies

These response bodies are new or changed this release.

Chatter

Link Metadata

This new response body has these properties.

- **description**—Description of the link.
- **frameSource**—HTML required to display the resource.
- **height**—Height required to display the HTML.
- **originalUrl**—Original URL that was used to request the metadata.
- **providerUrl**—URL of the provider that the information is retrieved from.
- **source**—Source of the link metadata. Values are:
 - **None**—Link metadata wasn't retrieved.
 - **Sfdc**—Salesforce is the source.
- **thumbnailUrl**—Thumbnail of the resource.
- **title**—Title of the link.
- **type**—Type of link that the metadata represents. Values are:
 - **Error**—Link metadata couldn't be retrieved.
 - **Link**—Represents a link.
 - **None**—Link metadata wasn't retrieved because the link isn't a whitelisted domain.
 - **Photo**—Represents a photo.
 - **Rich**—Represents rich content, typically HTML content.
 - **Unknown**—Link metadata was retrieved, but the type is unknown.
 - **Video**—Represents a video.
- **url**—URL of the image to display, if one is available.
- **width**—Width required to display the HTML.

Link Metadata Collection

This new response body has this property.

- **linkMetadataList**—List of metadata for links.

Chatter Feeds

Comment Capabilities

This response body has these new properties.

- **feedEntityShare**—If a comment has this capability, a feed entity is shared with it.
- **record**—If a comment has this capability, it has a record attachment.

Feed

This response body has these new properties.

- **redirectedFeedFilter**—Filter for the feed specified in `redirectedFeedType`. Otherwise, `null`.
- **redirectedFeedSort**—Sort order for the feed specified in `redirectedFeedType`. Otherwise, `null`.

Record Capability

This new response body has these properties.

- **recordId**—ID of the record.

- `url`—URL to the record.

Vote

This new response body has these properties.

- `type`—Type of vote for a feed element or comment. Values are:
 - Down
 - Up
- `user`—User who voted on the feed element or comment.
- `votedItem`—Reference to the feed element or comment that was voted on.

Vote Collection

This new response body has these properties.

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `items`—Collection of users and their upvotes or downvotes.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page, or `null` if there isn't a previous page.
- `total`—Total number of upvotes or downvotes for the feed element or comment.

Data Integration

Data Integration Credit

This new response body has these properties.

- `endDate`—End date of the contract.
- `orgCreditsTotal`—Total credits granted to the org to use during the contract period.
- `orgCreditsUsed`—Credits used by the org in the contract period.
- `sourceObjectName`—External object name.
- `startDate`—Start date of the contract.

Data Integration Credit Objects

This new response body has one property.

- `sourceObjectNames`—List of external object names of the active packages.

Duplicate Management

Duplicate Directory

This new response body has these properties.

- `jobDefinitions`—URL to the duplicate job definitions resource.
- `jobs`—URL to the duplicate jobs resource.

Duplicate Job

This new response body has these properties.

- `createdById`—ID of the user who created the job.

- `createdDate`—Date when the job was created.
- `endDateTime`—Date when the job ended.
- `jobDefinitionId`—ID of the job definition.
- `jobId`—ID of the job.
- `lastModifiedById`—ID of the user who last modified the job.
- `lastModifiedDate`—Date when the job was last modified.
- `name`—Name of the job.
- `numDuplicateRecordItems`—Number of duplicate records created by the job.
- `numDuplicateRecordSets`—Number of duplicate record sets created by the job.
- `numRecordsScanned`—Number of records scanned by the job.
- `resultListViewId`—ID of the result list view for the job.
- `startDateTime`—Date when the job started.
- `status`—Status of the job. Values are:
 - Canceled
 - Completed
 - Failed
 - InProgress
 - NotStarted
 - ResultsDeleted

Duplicate Job Collection

This new response body has one property.

- `jobs`—Collection of duplicate jobs.

Duplicate Job Definition

This new response body has these properties.

- `createdById`—ID of the user who created the job definition.
- `createdDate`—Date when the job definition was created.
- `developerName`—Developer name of the job definition.
- `jobDefinitionId`—ID of the job definition.
- `lastModifiedById`—ID of the user who last modified the job definition.
- `lastModifiedDate`—Date when the job definition was last modified.
- `masterLabel`—Master label of the job definition.
- `matchingRuleIds`—IDs of matching rules used by the job definition.
- `sobjectSubtype`—Object subtype of the job definition. Values are:
 - None
 - PersonAccount
- `sobjectType`—Object type of the job definition.

Duplicate Job Definition Collection

This new response body has one property.

- `jobDefinitions`—Collection of duplicate job definitions.

Users

Bookmark Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

Chatter Activity Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `commentCount`—Total number of comments in the org or community made by the user.
- `commentReceivedCount`—Total number of comments in the org or community received by the user.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.
- `likeReceivedCount`—Total number of likes on posts and comments in the org or community received by the user.
- `postCount`—Total number of posts in the org or community made by the user.

Comment Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `commentId`—ID of the comment.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

Company Verify Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

Downvote Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.

- `feedEntityId`—ID of the feed entity.

Feed Entity Read Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

Feed Post Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `commentId`—ID of the comment.
- `community`—Community in which the user performed the activity.
- `feedItemId`—ID of the post.

Feed Read Summary

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `containerId`—ID of the parent of the feed.
- `feedType`—Specifies the type of feed.

Like Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.
- `likeId`—ID of the like.

Mute Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

Topic Endorsement Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.
- `endorsementId`—ID of the topic endorsement.

Upvote Summary

This new response body has these properties.

- `activityDate`—Date of the user activity.
- `activityType`—Type of user activity.
- `activityUrl`—URL of the user activity.
- `community`—Community in which the user performed the activity.
- `feedEntityId`—ID of the feed entity.

User Activities Job

This new response body has these properties.

- `jobToken`—Token that identifies the user activities job.
- `jobType`—Type of user activities job. Value is `export` or `purge`.
- `message`—Message describing the status and expected outcome of the job.

User Activity Collection

This new response body has these properties.

- `activityType`—Type of user activity.
- `userActivities`—Collection of user activities.

Reports and Dashboards REST API

Reports and Dashboards REST API enhancements include new methods of report and dashboard folders, a URL parameter for the notifications resource to scope resources to Lightning dashboard subscriptions, new resources for report types, and new report and dashboard properties.

For more information, see the [Reports and Dashboards REST API Developer Guide](#).

New Resources and Parameters: `notifications?source=lightningDashboardSubscribe`, `related-objects`, and `text-values`

The `notifications?source` parameter supports a new value, `notifications?source=lightningDashboardSubscribe`, that describes Lightning dashboard subscriptions. The `reportTypes/<primary_object_name>/related-objects` resource describes secondary objects available for a specified primary object in cross filters. The `text-values` resource returns and lets you search text field values.

Resource URI	Supported HTTP Methods	Description
<code>/services/data/v42.0/analytics/notifications?source=lightningDashboardSubscribe</code>	GET	Return a list of recent notifications describing Lightning dashboard subscriptions (GET).
<code>/services/data/v42.0/analytics/reportTypes/<primary_object_name>/related-objects</code>	GET	Returns an array of secondary objects available for use with a primary object in a cross filter.
<code>/services/data/v42.0/analytics/reportTypes/<primary_object_name>/related-objects/<secondary_object_name></code>	GET	Returns an array of supported filter values for a secondary object in a cross filter. Not all objects are available as secondary objects. The primary object determines which secondary objects are supported. To get a list of supported secondary objects for a specified primary object, make a GET request to <code>/services/data/v42.0/analytics/reportTypes/<primary_object_name></code> and refer to the <code>objectRelationships</code> property of <code>reportTypeMetadata</code> .
<code>/services/data/v42.0/analytics/reportTypes/<report_type_name>/text-values/ report_column_api_name</code>	GET	<p>Returns <code>textValues</code>, which is an array of up to 200 values returned by the specified column.</p> <p>Also returns the <code>hasMore</code> property, which is a Boolean field that indicates whether there are more than 200 items in the <code>textValues</code> array (<code>true</code>) or not (<code>false</code>).</p>
		<p>For example, make a GET request to <code>/services/data/v42.0/analytics/reportTypes/Opportunity/text-values/ACCOUNT_NAME</code>. The response is:</p> <pre data-bbox="817 1227 1421 1374"> { "hasMore" : false, "textValues" : ["Acme", "Global Media", "Global Retail"] } </pre>
		<p>Optionally, use the <code>searchTerm</code> URL parameter to return only values that start with the value of <code>searchTerm</code>.</p>
		<p>For example, make a GET request to <code>/services/data/v42.0/analytics/reportTypes/Opportunity/text-values/ACCOUNT_NAME?searchTerm=Acme</code>. The response is:</p> <pre data-bbox="817 1649 1192 1776"> { "hasMore" : false, "textValues" : ["Acme"] } </pre>

New Methods: `folders`

The `folders` / REST API supports new methods that allow you to create, rename, and delete report and dashboard folders.

Resource URI	Supported HTTP Method	Description
<code>/services/data/v42.0/folders</code>	POST	Creates report or dashboard folder with the specified name, label, and type.
<code>/services/data/v42.0/folders/<folderid></code>	GET	Gets information about a report or dashboard folder.
<code>/services/data/v42.0/folders/<folderid></code>	PATCH	Updates the label of a report or dashboard folder.
<code>/services/data/v42.0/folders/<folderid></code>	DELETE	Deletes a report or dashboard folder.

Changed Resources: `dashboardMetadata` and `reportTypeMetadata`

We've updated report and dashboard metadata to describe newly available features in Lightning Experience. Report metadata now describes bucket columns and cross filters. Dashboard metadata now describes color palette and theme.

Reports and Report Types

The `reportTypeMetadata` object includes new properties that describe bucketing, cross filters, and role hierarchy filters.

Property	Type	Description
<code>bucketable</code>	Boolean	Indicates whether a field is can be used as the basis for a bucket column (<code>true</code>) or not (<code>false</code>).
<code>saveRoleHierarchy</code>	Boolean	Indicates whether a role hierarchy filter should be saved (<code>true</code>) or not (<code>false</code>).
<code>objectRelationships</code>	[objectRelationship]	<p><code>reportTypeMetadata</code> has a new property, <code>objectRelationships</code>, which is an array of objects (also called entities). Each object is named for a primary object, and describes the relationship between itself and related objects. The <code>objectRelationships</code> array is useful for seeing which objects are available for use as secondary objects on cross filters for a specified primary object. It describes how each secondary object joins with the primary object. Here are the properties of each object in the <code>objectRelationships</code> array:</p> <ul style="list-style-type: none"> • <code>label</code>—User-facing name of the primary object. • <code>primaryEntityField</code>—Field on which secondary objects join with the primary object. • <code>relatedObjects</code>—An array of secondary objects. Each object has these properties: <ul style="list-style-type: none"> – <code>label</code>—User-facing name of the secondary object.

Property	Type	Description
		<ul style="list-style-type: none"> — <code>relatedEntity</code>—API name of the secondary object — <code>relatedEntityJoinField</code>—The field on which the secondary object joins with the primary object.

The `reportTypes` object includes a new property indicating whether an administrator has hidden the report type.

Property	Type	Description
<code>isHidden</code>	Boolean	Indicates whether an administrator has hidden the report type (<code>true</code>) or not (<code>false</code>). Hidden report types don't appear in the report builder when creating a report.

The `buckets` array of bucket objects has a deprecated property, replaced by a new property.

Property	Type	Description
<code>developerName</code>	String	Deprecated in API version 42.0. Use <code>developerName</code> instead.
<code>developerName</code>	String	API name of the bucket.

Dashboards

The `dashboardMetadata` object has new properties that describe dashboard color palette and theme.

Property	Type	Description
<code>chartTheme</code>	String	<p>Specifies the dashboard theme. Possible values are:</p> <ul style="list-style-type: none"> • <code>light</code>—Default value. Dashboards have a light background that resembles a glass of milk. • <code>dark</code>—Dashboards have a dark background that is reminiscent of the night sky.
<code>colorPalette</code>	String	<p>Specifies a color palette for use in charts. Possible values are:</p> <ul style="list-style-type: none"> • <code>wildflowers</code>—Default value. • <code>aurora</code> • <code>nightfall</code> • <code>sunrise</code> • <code>bluegrass</code> • <code>ocean</code> • <code>heat</code> • <code>dusk</code> • <code>pond</code> • <code>watermelon</code>

Property	Type	Description
		<ul style="list-style-type: none"> • fire • water • lake • mineral—Accessible.

User Interface API

Build Salesforce UI for native mobile apps and custom web apps using the same API that Salesforce uses to build Lightning Experience and Salesforce for Android, iOS, and mobile web. Now you can get a directory of supported objects and build UI for picklists, dependent picklists, and lists.

IN THIS SECTION:

[Build UI for Dependent Picklists](#)

User Interface API exposes properties and resources that make it easy for a client to build picklists and dependent picklists.

[Build UI for List Views](#)

User Interface API has new resources that make it easy to get record data and metadata about list views displayed in the Salesforce UI. Use these resources to build UI for list views.

[Get a Directory of Supported Objects](#)

User Interface API supports all custom objects and many standard objects. Use a new resource to get a directory of objects that User Interface API supports and that the context user can access. Clients can discover in advance which objects they can access instead of coding against a `BAD_REQUEST` status.

[Improve App Performance with ETag Headers](#)

To reduce network traffic and increase your app's response time, use the `ETag` header to make conditional HTTP requests that take advantage of browser caching. If the browser cache holds the latest version of a representation, the web server returns only HTTP headers.

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A theme uses colors, images, and banners to change the overall appearance of Salesforce. Administrators can define themes and switch themes to provide a different look. The User Interface API response matches the Admin's selection.

Build UI for Dependent Picklists

User Interface API exposes properties and resources that make it easy for a client to build picklists and dependent picklists.

Picklists are complicated UI elements, and dependent picklists are especially tricky. The values in a dependent picklist field are filtered based on the selection in another field, called a controlling field. A controlling field can be a picklist field or a checkbox field. For example, imagine a Continents picklist that controls a Countries picklist that controls a Cities picklist and a Languages picklist field.

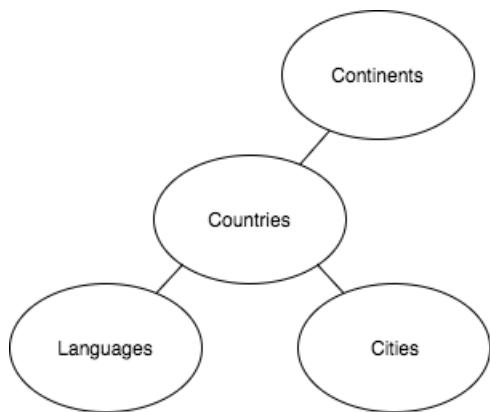
Dependent picklists exist in a field dependency tree that shows a hierarchy of controlling and dependent fields. Each node in the tree can have any number of child nodes. To build UI, you need to know the complete hierarchy.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



An object can have any number of field dependency trees. User Interface API exposes the collection of field dependency trees in a single property on each object called `dependentFields`. Each dependent field has a `controllingFields` property that lists the fields that control it. User Interface API also provides a batch resource to get all picklist values for a record type:

`/ui-api/object-info/{objectApiName}/picklist-values/{recordTypeId}`.

Here's a bit more information about the dependent and controlling fields properties.

- `{Object}.dependentFields`—A map of the dependent fields tree structure. Each nested object is another `Map<String, Object>`. When the object is empty, it indicates a leaf of the tree, which is a field that doesn't control other fields. An object can have multiple independent trees, which means this property can have multiple root objects.
Imagine an object with the picklists `Continents__c`, `Countries__c`, and `Cities__c`. `Continents__c` is the root. `Cities__c` is a leaf. `Continents__c` and `Countries__c` are controlling fields. `Cities__c` is a dependent picklist.
- `{Field}.controllingFields`—If this field is a dependent picklist, this property is a collection of fields that control the values in the picklist. When there's a hierarchy of controlling fields, the collection starts with the immediate parent and moves up the tree.

 **Tip:** For more information, see “Build UI for Picklists” in the User Interface API Developer Guide.

Build UI for List Views

User Interface API has new resources that make it easy to get record data and metadata about list views displayed in the Salesforce UI. Use these resources to build UI for list views.

Introducing List View Resources

Use these resources to get record data and metadata for list views:

- `/ui-api/list-records/${listViewId} or
/ui-api/list-records/${objectApiName}/${listViewApiName}`—Get the record data for a list view.
- `/ui-api/list-info/${listViewId} or
/ui-api/list-info/${objectApiName}/${listViewApiName}`—Get the metadata for a list view.
- `/ui-api/list-ui/${listViewId} or
/ui-api/list-ui/${objectApiName}/${listViewApiName}`—Get the record data and metadata for a list view.

Get Record Data and Metadata for a List View

As an example, let's say we have a list view named All Accounts with a list view ID of 00BR0000000Wc0r. To get information about all the records and metadata for this list view, make this request:

```
/services/data/v42.0/ui-api/list-ui/00BR0000000Wc0r
```

You can also use the object API name and list view API name to make the same request:

```
/services/data/v42.0/ui-api/list-ui/Account/AllAccounts
```

The request returns a list of records and the metadata for the list view.

```
{  
    "eTag" : "ca78063dc5bd0fe520d5a6f88d9cd579",  
    "info" : {  
        "cloneable" : true,  
        "createable" : true,  
        "deletable" : true,  
        "displayColumns" : [ {  
            "fieldApiName" : "Name",  
            "label" : "Account Name",  
            "sortable" : true  
        }, {  
            "fieldApiName" : "BillingState",  
            "label" : "Billing State/Province",  
            "sortable" : true  
        }, {  
            "fieldApiName" : "Phone",  
            "label" : "Phone",  
            "sortable" : true  
        }, {  
            "fieldApiName" : "Type",  
            "label" : "Type",  
            "sortable" : true  
        }, {  
            "fieldApiName" : "Owner.Alias",  
            "label" : "Account Owner Alias",  
            "sortable" : true  
        } ],  
        "eTag" : "86d3a33eddb41d9889b38b102c915abf",  
        "filterLogicString" : null,  
        "filteredByInfo" : [ ],  
        "id" : {  
            "id" : "00BR0000000Wc0rMAC",  
            "objectApiName" : "Account",  
            "type" : "listView"  
        },  
        "label" : "All Accounts",  
        "listViewApiName" : "AllAccounts",  
        "orderedByInfo" : [ {  
            "fieldApiName" : "Name",  
            "isAscending" : true,  
            "label" : "Account Name"  
        } ],  
        "updateable" : true,  
    }  
}
```

```
"userPreferences" : {
    "columnWidths" : {
        "Type" : -1,
        "Owner.Alias" : -1,
        "Phone" : -1,
        "BillingState" : -1,
        "Name" : -1
    },
    "columnWrap" : {
        "Type" : false,
        "Owner.Alias" : false,
        "Phone" : false,
        "BillingState" : false,
        "Name" : false
    }
},
"visibility" : "Public",
"visibilityEditable" : true
},
"records" : {
    "listInfoETag" : "86d3a33eddb41d9889b38b102c915abf",
    "records" : {
        "count" : 3,
        "currentPageUrl" :
"/services/data/v42.0/ui-api/list-records/00BR0000000Wc0rMAC?pageSize=50&pageToken=0",
        "nextPageUrl" : null,
        "previousPageUrl" : null,
        "records" : [ {
            "apiName" : "Account",
            "childRelationships" : { },
            "eTag" : "d2ac6442449f4818a11b6ea6bc09b39a",
            "fields" : {
                "BillingState" : {
                    "displayValue" : null,
                    "value" : "NY"
                },
                "CreatedDate" : {
                    "displayValue" : null,
                    "value" : "2017-11-01T19:10:42.000Z"
                },
                "Id" : {
                    "displayValue" : null,
                    "value" : "001R0000003IXwiIAG"
                },
                "LastModifiedDate" : {
                    "displayValue" : null,
                    "value" : "2017-11-01T19:10:42.000Z"
                },
                "Name" : {
                    "displayValue" : null,
                    "value" : "Acme"
                },
                "Owner" : {
                    "displayValue" : null,
```

```

    "value" : {
        "apiName" : "User",
        "childRelationships" : { },
        "eTag" : "80236fa1232c205cbfdd1c2f53b1d6b6",
        "fields" : {
            "Alias" : {
                "displayValue" : null,
                "value" : "AUser"
            },
            "Id" : {
                "displayValue" : null,
                "value" : "005R0000000ITVpIAO"
            }
        },
        "id" : "005R0000000ITVpIAO",
        "recordTypeInfo" : null
    }
},
"OwnerId" : {
    "displayValue" : null,
    "value" : "005R0000000ITVpIAO"
},
"Phone" : {
    "displayValue" : null,
    "value" : "(212) 555-5555"
},
"SystemModstamp" : {
    "displayValue" : null,
    "value" : "2017-11-01T19:10:42.000Z"
},
>Type" : {
    "displayValue" : "Prospect",
    "value" : "Prospect"
}
},
"id" : "001R0000003IXwiIAG",
"recordTypeInfo" : null
}
...
Additional records removed for brevity ...
]
}
}
}

```

Modify the List View Results

To modify the results returned by the List View resources, use the following request parameters:

- **fields**—Additional fields queried for the records returned, for display purposes. If a field is specified and the user doesn't have access to it, an error occurs.
- **optionalFields**—Additional fields queried for the records returned, for display purposes. If a field is specified and the user doesn't have access to it, no error occurs.
- **pageSize**—The number of list records viewed at one time.
- **pageToken**—A token that represents the page offset.

- `sortBy`—The API name of the field the list view is sorted by.

For example, to sort records by the date they were created, set the `sortBy` parameter to `CreatedDate`.

```
GET /services/data/v42.0/ui-api/list-ui/00BR0000000WcOr?sortBy=CreatedDate
```

Get a Directory of Supported Objects

User Interface API supports all custom objects and many standard objects. Use a new resource to get a directory of objects that User Interface API supports and that the context user can access. Clients can discover in advance which objects they can access instead of coding against a `BAD_REQUEST` status.

Use the new object directory resource as a client's entry point to User Interface API.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

```
GET /ui-api/object-info/
```

The response includes an `objectInfoUrl` property that returns metadata about each supported object.

```
{
  "objects" : {
    "Account" : {
      "apiName" : "Account",
      "label" : "Account",
      "labelPlural" : "Accounts",
      "objectInfoUrl" : "/services/data/v42.0/ui-api/object-info/Account"
    },
    "Asset" : {
      "apiName" : "Asset",
      "label" : "Asset",
      "labelPlural" : "Assets",
      "objectInfoUrl" : "/services/data/v42.0/ui-api/object-info/Asset"
    },
    "AssetRelationship" : {
      "apiName" : "AssetRelationship",
      "label" : "Asset Relationship",
      "labelPlural" : "Asset Relationships",
      "objectInfoUrl" : "/services/data/v42.0/ui-api/object-info/AssetRelationship"
    },
    "Campaign" : {
      "apiName" : "Campaign",
      "label" : "Campaign",
      "labelPlural" : "Campaigns",
      "objectInfoUrl" : "/services/data/v42.0/ui-api/object-info/Campaign"
    },
    ...
  }
}
```

Improve App Performance with `ETag` Headers

To reduce network traffic and increase your app's response time, use the `ETag` header to make conditional HTTP requests that take advantage of browser caching. If the browser cache holds the latest version of a representation, the web server returns only HTTP headers.

To take advantage of caching, User Interface API responses include an `ETag` header field. The `ETag` (or Entity Tag) contains a hash that identifies a representation: `ETag : "b9a5cd4fbfcf1b65b03d95a4d9ffa8f4--gzip"`. When a representation changes, the web server generates a new `ETag`.

The client saves the `ETag` and sends it in a header in subsequent requests for the resource: `If-None-Match : "b9a5cd4fbfcf1b65b03d95a4d9ffa8f4"`. The web server compares this `ETag` value with the `ETag` value of the current version of the representation. If the values are the same, the browser cache holds the latest version and the web server returns an HTTP status of 304 Not Modified.

```
GET /ui-api/object-info/account

HTTP/1.1 200 OK
Date: Tue, 07 Nov 2017 04:27:43 GMT
Strict-Transport-Security: max-age=31536000; includeSubDomains
X-Content-Type-Options: nosniff
X-XSS-Protection: 1; mode=block
Content-Security-Policy: upgrade-insecure-requests
X-Robots-Tag: none
Cache-Control: no-cache,must-revalidate,max-age=0,no-store,private
Set-Cookie: BrowserId=GHRCS0saRl64DgVv-NrLjA; Path=/; Domain=.salesforce.com; Expires=Sat, 06-Jan-2018 04:27:45 GMT; Max-Age=5184000
Expires: Thu, 01 Jan 1970 00:00:00 GMT
ETag: "b9a5cd4fbfcf1b65b03d95a4d9ffa8f4--gzip"
Content-Type: application/json; charset=UTF-8
Vary: Accept-Encoding
Content-Encoding: gzip
Transfer-Encoding: chunked

{
  "apiName" : "Account",
  "childRelationships" : [ {
    "childObjectName" : "Account",
    "fieldName" : "ParentId",
    "junctionIdListNames" : [ ],
    "junctionReferenceTo" : [ ],
    "relationshipName" : "ChildAccounts"
    ... response shortened ...
  } ]
  ...
}
```

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Get a Salesforce Org's Active Theme

A theme uses colors, images, and banners to change the overall appearance of Salesforce. Administrators can define themes and switch themes to provide a different look. The User Interface API response matches the Admin's selection.

To get an org's active theme, make a request to this resource.

```
GET /ui-api/themes/active
```

The response body includes the colors, images, and banners for pages, groups, and users. Banners have a higher aspect ratio than images and display across a page.

Tooling API

Tooling API includes new and changed objects.

The [Tooling API Developer's Guide](#) contains all Tooling API information.

IN THIS SECTION:

[Tooling API New and Changed Objects](#)

Tooling API includes new and changed objects. Also, you can update individual fields of top-level Settings objects and their child objects.

Tooling API New and Changed Objects

Tooling API includes new and changed objects. Also, you can update individual fields of top-level Settings objects and their child objects.

New Objects

CustomApplication

Represents a custom or standard application.

DataIntegrationRecordPurchasePermission

Represents Lightning Data purchase credits that a Salesforce admin has granted to users.

DuplicateJobDefinition

Setup object defining a job that identifies duplicate record items globally.

DuplicateJobMatchingRuleDefinition

Setup object specifying a MatchingRule to use with DuplicateJob instances that share a DuplicateJobDefinition.

MatchingRule

Setup object specifying a MatchingRule to use with DuplicateJob instances that share a DuplicateJobDefinition.

PackageInstallRequest

Represents a request to install a package (first- and second-generation) in a target subscriber org.

SubscriberPackageVersion

Represents a package version (first- and second-generation) across all Salesforce instances.

Changed Objects

ActionOverride

The following field changed.

FormFactor

The `Small` value is now supported. It represents the Salesforce mobile app on a phone or tablet.

ApexPage

The following fields from previous releases have been added to the *Tooling API Reference and Developer Guide*.

ApiVersion

The API version for this page. Every page has an API version specified at creation.

ControllerKey

The identifier for the controller associated with this page.

ControllerType

The type of controller associated with this Visualforce page.

Description

The description of the Visualforce page.

FullName

The full name of the associated metadata object in Metadata API.

IsAvailableInTouch

Indicates if Visualforce tabs associated with the Visualforce page can be used in the Salesforce app.

IsConfirmationTokenRequired

Indicates whether GET requests for the page require a CSRF confirmation token.

Markup

The Visualforce markup, HTML, Javascript, and any other Web-enabled code that defines the content of the page.

MasterLabel

The text used to identify the Visualforce page in the Setup area of Salesforce.

Metadata

The Visualforce page metadata.

Name

The name of the Visualforce page.

NamespacePrefix

The namespace prefix associated with the object.

EmbeddedServiceLiveAgent

The following fields have been added.

CustomPrechatComponent

The custom Lightning Component that's used for the pre-chat page in this Snap-ins Chat deployment.

CustomPrechatComponentId

The ID of the custom Lightning Component that's used for the pre-chat page in this Snap-ins Chat deployment.

Flow

The following fields have changed.

ProcessType

The labels for some process types have changed in all API versions.

- The label for `Flow` is now **Screen Flow**. Previously, the label was **Flow**.
- The label for `Workflow` is now **Record Change Process**. Previously, the label was **Workflow**.
- The label for `CustomEvent` is now **Platform Event Process**. Previously, the label was **Platform Event**.
- The label for `FieldServiceMobile` is now **Field Service Mobile Flow**. Previously, the label was **Field Service Mobile**.
- The label for `FieldServiceWeb` is now **Field Service Snap-In Flow**. Previously, the label was **Field Service Web**.

actionType

A valid value for this field has been added.

- `generateWorkOrders`—creates a new work order record.

PackageUploadRequest

The following field changed.

Status

There is a new valid value, `Queued`, for the time between the `PackageUploadRequest` object being uploaded and the upload beginning.

RecentlyViewed

Clarified that `RecentlyViewed` data is retained for 90 days, after which the data is removed on a periodic basis. You can always export the `RecentlyViewed` data to save it.

Metadata API

Metadata API includes new and changed types and fields.

New Metadata Types

EmailServicesFunction

Represents an email service.

EmbeddedServiceBranding

Represents the branding for each Snap-ins deployment. Introduced in API version 39.0, this type has been added to the Metadata API Developer Guide.

EmbeddedServiceConfig

Represents a setup node for creating a Snap-ins deployment. Introduced in API version 37.0, this type has been added to the Metadata API Developer Guide.

EmbeddedServiceLiveAgent

Represents a setup node for creating a Snap-ins Chat Live Agent deployment. Introduced in API version 38.0, this type has been added to the Metadata API Developer Guide.

Updated Metadata Types and Fields

These metadata types have changed or have fields that are new or have changed.

ActionOverride

The `formFactor` field now supports the `Small` value, which represents the Salesforce mobile app on a phone or tablet.

ActivitySettings

The `autoRelateEventAttendees` field lets admins set events to automatically relate up to 50 contacts or one lead when users invite the contacts or lead to the event.

CompactLayout

Represents a compact layout. This type is now available for external objects.

CustomApplication

This type was reorganized to consolidate fields into logical groupings to make it easier to use only the fields you need.

The following fields are new.

consoleConfig

Represents configuration settings for a Salesforce console app.

preferences

Represents the preferences for a Salesforce console app.

shouldOverrideOrgTheme

Indicates whether to override the global theme for the org.

The following fields have been renamed.

customShortcut (in the KeyboardShortcuts subtype)

This field is now called `customShortcuts`.

defaultShortcut (in the KeyboardShortcuts subtype)

This field is now called `defaultShortcuts`.

tab

This field is now called `tabs`.

workspaceMappings

This field is now called `workspaceConfig`.

The following subtypes are new.

AppPreferences

This subtype consolidates the preferences for a Salesforce console app.

ServiceCloudConsoleConfig

This subtype consolidates the configuration settings for the Service Cloud console.

The following fields have been moved.

customApplicationComponents

This field is now called `componentList` and is found in the ServiceCloudConsoleConfig subtype.

detailPageRefreshMethod

This field is now found in the ServiceCloudConsoleConfig subtype.

enableCustomizeMyTabs

This field is now found in the AppPreferences subtype.

enableKeyboardShortcuts

This field is now found in the AppPreferences subtype.

enableListViewHover

This field is now found in the AppPreferences subtype.

enableListViewReskin

This field is now found in the AppPreferences subtype.

enableMultiMonitorComponents

This field is now found in the AppPreferences subtype.

enablePinTabs

This field is now found in the AppPreferences subtype.

enableTabHover

This field is now found in the AppPreferences subtype.

enableTabLimits

This field is now found in the AppPreferences subtype.

footerColor

This field is now found in the ServiceCloudConsoleConfig subtype.

headerColor

This field is now found in the ServiceCloudConsoleConfig subtype.

keyboardShortcuts

This field is now found in the ServiceCloudConsoleConfig subtype.

listPlacement

This field is now found in the ServiceCloudConsoleConfig subtype.

listRefreshMethod

This field is now found in the ServiceCloudConsoleConfig subtype.

liveAgentConfig

This field is now found in the ServiceCloudConsoleConfig subtype.

primaryTabColor

This field is now found in the ServiceCloudConsoleConfig subtype.

pushNotifications

This field is now found in the ServiceCloudConsoleConfig subtype.

saveUserSessions

This field is now found in the AppPreferences subtype.

tabLimitConfig

This field is now found in the ServiceCloudConsoleConfig subtype.

The following subtypes have been deleted.

DomainWhitelist

This subtype is no longer used.

PagesToOpen

This subtype is no longer used.

PushNotifications

This subtype is no longer used.

The following subtypes have been replaced.

CustomApplicationComponents

The AppComponentList subtype replaces this subtype.

WorkspaceMappings

The AppWorkspaceConfig subtype replaces this subtype.

CustomObject

The following fields have changed.

compactLayoutAssignment

Represents the compact layout assigned to the object. This field is now available for external objects.

compactLayouts

A list of compact layouts associated with the object. This field is now available for external objects.

CustomObjectTranslation

The following field has been added.

description

Translation for the record type description.

Dashboard

The following fields have been added.

breakPoint1

The value that separates the `lowRangeColor` from the `midRangeColor` on the dashboard.

breakPoint2

The value that separates the `midRangeColor` from the `highRangeColor` on the dashboard.

breakPointOrder

Conditional highlighting can be applied to multiple columns. This field stores the order of conditional highlights.

chartTheme

Determines the default theme for all dashboard charts. This field replaces `dashboardChartTheme` for API version 42.0 and later. The `dashboardChartTheme` field is still available for backward compatibility with versions before API version 42.0.

colorPalette

Determines the default palette for all dashboard charts. This field replaces `dashboardColorPalette` for API version 42.0 and later. The `dashboardColorPalette` field is still available for backward compatibility with versions before API version 42.0.

flexComponentProperties (Dashboard Component)

Defines metadata for Lightning Experience table columns and sorting.

flexTableColumn (FlowScreen subtype)

Represents a column in a Lightning Experience table component.

flexTableSortInfo

Represents sorting column and order in a Lightning Experience table component.

hideChatterPhotos

If true, hides any photos from Chatter feeds.

highRangeColor

The color representing a high number range on the column.

lowRangeColor

The color representing a low number range on the column.

midRangeColor

The color representing a mid number range on the column.

numSubscriptions

Indicates the number of subscriptions reported on the dashboard.

reportColumn (DashboardComponentColumn subtype)

Indicates the report column code for the filter.

showTotal (DashboardComponentColumn subtype)

If true, the column total is displayed.

sortColumn (DashboardComponentSortInfo subtype)

Indicates the column on which the table is sorted.

sortOrder (DashboardComponentSortInfo subtype)

Indicates the sort order for the table.

type (DashboardComponentColumn subtype)

Represents the type of Lightning Experience table column (details, aggregates, or grouping).

FlexiPage

The following enumeration value has been added to the `type` field.

CommGlobalSearchResultPage

A Lightning page used to override the global search result page in Communities, as created in Community Builder.

The `leftValue` field now accepts expressions to help define component visibility rules on Lightning pages. For example, to display a component only to the system administrator, use `{ !$User.Profile.Name } EQUAL "System Administrator"`.

Flow

The following fields are new.

extensionName (FlowScreenField subtype)

The name of the Lightning component to display.

inputParameters (FlowScreenField subtype)

An array of input parameters. Supported only when `fieldType` is `ComponentInstance`.

outputParameters (FlowScreenField subtype)

An array of output parameters. Supported only when `fieldType` is `ComponentInstance`.

showFooter (FlowScreen subtype)

Indicates whether to show (`true`) or hide (`false`) the screen's footer at runtime.

showHeader (FlowScreen subtype)

Indicates whether to show (`true`) or hide (`false`) the screen's header at runtime.

stages

An array of stages that can be used throughout the flow. A stage is a section of your flow that can be represented in the UI, such as with breadcrumbs. Flow stages are a beta feature.

The following fields have been updated.

actionType (FlowActionCall subtype)

The enumerated value `choosePricebook` is new. This value is used to select a price book.

fieldType (FlowScreenField subtype)

The enumerated value `ComponentInstance` is new. This value is used for Lightning component screen fields.

Field Types

The following enumeration value has been corrected.

Location

The name of the Location custom field type has been corrected in the Metadata API Developer Guide. The Location field type is used to define geolocation fields in the user interface.

ForecastingSettings

The following field is new.

ForecastingDateType

The date type that forecast amounts are based on in Collaborative Forecasts. Valid values are `OpportunityCloseDate` (default), `ProductDate`, and `ScheduleDate`. In API version 42.0, date types are read only and available only via API.

OrderSettings

The following field was added.

enableZeroQuantity

Indicates whether users in the organization can add order products with quantities of zero (`true`) or not (`false`). This has a default value of `false`.

To enable this preference, `enableOrders` must be set to `true`.

Available in API version 42.0 and later.

Layout

The following fields are new.

createAction (SidebarComponent subtype)

If the component is a lookup field, the name of the quick action used to create a record.

enableLinking (SidebarComponent subtype)

If the component is a lookup field, lets users associate a record with this field.

updateAction (SidebarComponent subtype)

If the component is a lookup field, the name of the quick action used to update a record.

Queue

The following fields are new.

publicGroups

Represents public groups in the org. Public groups can be used to add queue members.

queueMembers

Represents queue members added to the queue. Members can be added directly or selected by roles and public groups they belong to.

queueRoutingConfig

Represents the routing configuration name. Applies to orgs that use Omni-Channel with a routing configuration.

roleAndSubordinates

Represents roles and their subordinates in the org's role hierarchy, including customer and partner roles. Roles and their subordinate hierarchy can be used to add queue members.

roleAndSubordinatesInternal

Represents roles and their subordinates in the org's role hierarchy, excluding customer and partner roles. Roles and their subordinate hierarchy can be used to add queue members.

roles

Represents roles in the org. Roles can be used to add queue members.

users

Represents users in the org. Users can be added directly as queue members.

SecuritySettings

The following fields are new.

enableContentSniffingProtection

Indicates if the browser is prevented from inferring the MIME type from the document content and from executing malicious files (JavaScript, Stylesheet) as dynamic content.

enableUpgradeInsecureRequests

Indicates if HTTPS is required for connecting to third-party domains.

enableXssProtection

Indicates if protection against reflected cross-site scripting attacks is enabled.

identityConfirmationOnEmailChange

Indicates if a user's identity is confirmed when changing their email address, instead of requiring a relogin.

identityConfirmationOnTwoFactorRegistrationEnabled

Indicates if users are required to confirm their identities to add a two-factor authentication method, such as Salesforce Authenticator, instead of requiring a relogin.

redirectionWarning

Indicates whether users see an alert when they click a link in a Web Tab that redirects them outside the salesforce.com domain.

referrerPolicy

Indicates whether the referrer header hides sensitive information that could be present in the full URL.

Data Services: Compliance Enhancements and Delete Permissions

New delete permissions and capabilities are available for custom big objects and Field Audit Trail.

IN THIS SECTION:

[Let Users Delete Data in Custom Big Objects](#)

Use profiles and permission sets to give specific users the ability to delete big objects. Respond to delete requests and ensure clean data using new API calls.

[Delete Field History and Field Audit Trail Data](#)

Use profiles and permission sets to give specific users the ability to delete field history and field history archive data. Respond to delete requests and ensure clean data using new API calls.

Let Users Delete Data in Custom Big Objects

Use profiles and permission sets to give specific users the ability to delete big objects. Respond to delete requests and ensure clean data using new API calls.

Use the Apex method `deleteImmediate()` to delete data in a custom big object. Declare an sObject that contains all the fields in the custom big object's index. The sObject acts like a template. All rows that match the sObject's fields and values are deleted. You can only specify fields that are part of the big object's index. You must specify all fields in the index. You can't include a partially specified index or non-indexed field, and wildcards are not supported.

In the following example, the custom big object has an index of `Account__c`, `Game_Platform__c`, and `Play_Date__c`. When specifying specific values after the `WHERE` clause, fields must be listed in the order they appear in the index, without any gaps.

```
<!-- Declare sObject using the index of the custom big object -->
List<Customer_Interaction__b> cBO = new List<sObject>();
cBO.addAll([SELECT Account__c, Game_Platform__c, Play_Date__c FROM
Customer_Interaction__b WHERE Account__c = '001d000000Ky3xIAB']);
Database.deleteImmediate(cBO);
```

Alternatively, use the new SOAP call `deleteByExample()` and declare an sObject that contains the fields and values to delete. The sObject acts like a template. All rows that match the sObject's fields and values are deleted. You can only specify fields that are part of the big object's index. You must specify all fields in the index. You can't include a partially specified index or non-indexed field, and wildcards are not supported. This example deletes all rows in which `Account__c` is "001d000000Ky3xIAB", `Game_Platform__c` is "iOS", and `Play_Date__c` is "2017-11-28T19:13:36.000z".

Java example code:

```
public static void main(String[] args) {
    try{
        Customer_Interaction__b[] sObjectsToDelete = new Customer_Interaction__b[1];
        //Declare an sObject that has the values to delete
        Customer_Interaction__b customerBO = new Customer_Interaction__b();
        customerBO.setAccount__c ("001d000000Ky3xIAB");
        customerBO.setGame_Platform__c ("iOS");
        Calendar dt = new GregorianCalendar(2017, 11, 28, 19, 13, 36);
        customerBO.setPlay_Date__c(dt);
```

```

        sObjectsToDelete[0] = customerBO;
        DeleteByExampleResult[] result = connection.deleteByExample(sObjectsToDelete);
    } catch (ConnectionException ce) {
        ce.printStackTrace();
    }
}

```

Delete Field History and Field Audit Trail Data

Use profiles and permission sets to give specific users the ability to delete field history and field history archive data. Respond to delete requests and ensure clean data using new API calls.

The two org preferences to enable these permissions, Delete From Field History and Delete From Field History Archive, can be found in [Setup | User Interface](#). In addition, assign the user permissions Delete From Field History and Delete From Field History Archive to users using profiles or permission sets.

Delete field history data, such as AccountHistory, and field history archive data by passing in a list of Id values as strings using Apex or SOAP `delete()`. Apex `delete()` also works with a list of sObjects with the Id field populated.

The sObject acts like a template. All rows that match the sObject's fields and values are deleted. You can only specify fields that are part of the big object's index. You must specify all fields in the index. You can't include a partially specified index or non-indexed field, and wildcards are not supported.

Sample for deleting AccountHistory:

```

List<AccountHistory> ah = new List<sObject>();
ah.addAll( [ SELECT Id FROM AccountHistory
WHERE AccountId = '001d00000Ky3xIAB' AND CreatedDate = YESTERDAY ] );
Database.delete(ah);

```

Samples for deleting from FieldHistoryArchive:

```

List<FieldHistoryArchive> fha = new List<sObject>();
fha.addAll([SELECT FieldHistoryType, ParentId, CreatedDate, HistoryId FROM
FieldHistoryArchive
WHERE FieldHistoryType = 'Account' AND ParentId = '001d00000Ky3xIAB' AND CreatedDate =
'2017-11-28T19:13:36.000z' AND HistoryId = '017D000000ESURXIA5']);
Database.delete(fha);

```

Alternatively, delete field history archive data with the new SOAP call `deleteByExample()`. Declare an sObject containing the fields and values in the FieldHistoryArchive big object to delete. This example deletes all rows that meet the specified criteria.

```

public static void main(String[] args) {
    try{
        //Create two sObjects to delete and place them in an array of sObjects to pass to
        //the delete method
        FieldHistoryArchive[] sObjectsToDelete = new FieldHistoryArchive[2];
        FieldHistoryArchive fha_1 = new FieldHistoryArchive();
        fha_1.setFieldHistoryType("Account");
        fha_1.setParentId("001d00000Ky3xIAB");
        Calendar dt = connection.getServerTimestamp().getTimestamp();
        dt.add(Calendar.DAY_OF_MONTH, -7);
        fha_1.setCreatedDate(dt);
        fha_1.setHistoryId("017D000000ESURXIA5");
        sObjectsToDelete[0] = fha_1;
    }
}

```

```

FieldHistoryArchive fha_2 = new FieldHistoryArchive();
fha_2.setFieldHistoryType("Account");
fha_2.setParentId("001d000000Ky3xIAB");
fha_2.setCreatedDate(dt);
fha_2.setHistoryId("017D000000ESURXIA5");
sObjectsToDelete[1] = fha_2;
DeleteByExampleResult[] result = connection.deleteByExample(sObjectsToDelete);
} catch (ConnectionException ce) {
    ce.printStackTrace();
}
}
}

```

Salesforce Console APIs

We made enhancements to the Salesforce Console Integration Toolkit and to the Salesforce Lightning Console JavaScript APIs. Many of the Salesforce Classic methods used in existing Visualforce pages and third-party web tabs now work in Lightning Experience. Visualforce pages can detect whether they're loaded in the UI theme for Lightning apps with console navigation versus the UI theme for Lightning apps with standard navigation. Lightning console apps now support using web tabs with third-party domains so that users can access web applications or other websites from within the application. The Omni-Channel methods in the Lightning JavaScript APIs are generally available, and console events have been added. These changes are new to Lightning Experience.

The following methods are new or have changed in API version 42.0.

API Name

openSubtab

Lightning console now supports using web tabs with third-party domains so that your users can access web applications or other websites from within the application. Third-party URLs are supported when you add the site as a CSP Trusted Site.

opentab

Lightning console now supports using web tabs with third-party domains so that your users can access web applications or other websites from within the application. Third-party URLs are supported when you add the site as a CSP Trusted Site.

Omni-Channel

The Omni-Channel methods are generally available. Also, the following events are available:

lightning:omniChannelLoginSuccess

Indicates that an agent has logged in to Omni-Channel successfully.

lightning:omniChannelStatusChanged

Indicates that an agent has changed his or her presence status in Omni-Channel.

lightning:omniChannelLogout

Indicates that an agent has logged out of Salesforce.

lightning:omniChannelWorkAssigned

Indicates that an agent has been assigned a new work item.

lightning:omniChannelWorkAccepted

Indicates that an agent has accepted a work assignment, or that a work assignment has been automatically accepted.

lightning:omniChannelWorkDeclined

Indicates that an agent has declined a work assignment.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

lightning:omniChannelWorkClosed

Indicates that an agent has closed a tab in the console that's associated with a work item.

lightning:omniChannelWorkloadChanged

Indicates that an agent's workload has changed. It also indicates that there has been a change to an agent's capacity or presence configuration, or that the agent has gone offline in the Omni-Channel utility.

SEE ALSO:

[Use Classic Console Integration Toolkit Methods in Lightning Experience](#)

[Detect the Lightning Console UI Theme in Visualforce Pages](#)

[Use Visualforce URLs in Lightning openTab and openSubtab Methods](#)

Debugging: Logging Improvements, More Debugging for ISVs, Event Types for External Object Callouts

Public site users no longer need a browser cookie to activate debug logging. Debug logs are no longer filled with `ENTERING_MANAGED_PKG` events when your log level for the Apex Code category is INFO or DEBUG. ISVs now get a free ISV Customer Debugger session, even if they've purchased Apex Debugger sessions. New and updated event types let you troubleshoot issues regarding accessing external object data.

IN THIS SECTION:

[Collect Debug Logs for Guest Users Without Setting Cookies](#)

In Winter '17, we introduced a change that required guest users to set browser cookies to activate debug logging. We had the best of intentions: All your public site visitors share one guest user license. Thus, when you enable logging for the guest user, the visitors' collective activities can fill your debug logs quickly, hitting the log-size limit and causing log truncation. Sadly, people didn't like the Winter '17 change. Setting cookies is complicated, and the change made collecting debug logs for public users' asynchronous activity impossible. We've seen the error of our ways. Your public users no longer need a `debug_logs` browser cookie to trigger logging. This change applies to both Lightning Experience and Salesforce Classic.

[Avoid Huge Debug Logs for Managed Package Code](#)

Debug logs no longer include `ENTERING_MANAGED_PKG` events when your log level for the Apex Code category is INFO or DEBUG. To log `ENTERING_MANAGED_PKG` events, set your Apex Code log level to FINE, FINER, or FINEST.

[Use Free ISV Customer Debugger Sessions Along with Purchased Apex Debugger Sessions](#)

All ISV License Management Orgs have a free ISV Customer Debugger session that allows debugging in one customer sandbox at a time. An ISV can also purchase Apex Debugger sessions, which allow interactive real-time debugging in a customer's sandbox or the ISV's sandboxes and scratch orgs. Until now, an ISV that purchased Apex Debugger sessions didn't receive the free ISV Customer Debugger session. We fixed this bug.

[Troubleshoot External Object Callouts with New and Updated Debug Event Types](#)

Debug logs now include details about the requests and responses that occur when a user or the platform accesses a Salesforce Connect external object. We added three new event types and made two OData-specific event types available for all Salesforce Connect adapters.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Collect Debug Logs for Guest Users Without Setting Cookies

In Winter '17, we introduced a change that required guest users to set browser cookies to activate debug logging. We had the best of intentions: All your public site visitors share one guest user license. Thus, when you enable logging for the guest user, the visitors' collective activities can fill your debug logs quickly, hitting the log-size limit and causing log truncation. Sadly, people didn't like the Winter '17 change. Setting cookies is complicated, and the change made collecting debug logs for public users' asynchronous activity impossible. We've seen the error of our ways. Your public users no longer need a `debug_logs` browser cookie to trigger logging. This change applies to both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Salesforce Help: Debug Log Levels](#)

[Salesforce Winter '17 Release Notes: Set a Browser Cookie to Enable Debug Logging for Guest Users](#)

Avoid Huge Debug Logs for Managed Package Code

Debug logs no longer include `ENTERING_MANAGED_PKG` events when your log level for the Apex Code category is INFO or DEBUG. To log `ENTERING_MANAGED_PKG` events, set your Apex Code log level to FINE, FINER, or FINEST.

SEE ALSO:

[Salesforce Help: Debug Log Levels](#)

[IdeaExchange: Debug logging level that will prevent ENTERING_MANAGED_PKG appearing in the log](#)

Use Free ISV Customer Debugger Sessions Along with Purchased Apex Debugger Sessions

All ISV License Management Orgs have a free ISV Customer Debugger session that allows debugging in one customer sandbox at a time. An ISV can also purchase Apex Debugger sessions, which allow interactive real-time debugging in a customer's sandbox or the ISV's sandboxes and scratch orgs. Until now, an ISV that purchased Apex Debugger sessions didn't receive the free ISV Customer Debugger session. We fixed this bug.

SEE ALSO:

[Force.com IDE Developer Guide: Get Started with the ISV Customer Debugger](#)

Troubleshoot External Object Callouts with New and Updated Debug Event Types

Debug logs now include details about the requests and responses that occur when a user or the platform accesses a Salesforce Connect external object. We added three new event types and made two OData-specific event types available for all Salesforce Connect adapters.

SEE ALSO:

[Troubleshoot Access to External Objects with New and Updated Debug Event Types](#)

Editions

Salesforce Connect is available in: **Developer** Edition and for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

Developer Hub: Manage Your Scratch Orgs

Use the Developer Hub (Dev Hub) to create, delete, and manage your scratch orgs. After you set up your project on your local computer, authorize the Dev Hub org using the Salesforce CLI.

Dev Hub Available in Government and Public Clouds

Government and public cloud customers can now enable Dev Hub in their production orgs. After Dev Hub is enabled, you can create scratch orgs.

The Dev Hub org instance determines where scratch orgs are created.

- Scratch orgs created from a Dev Hub org in Government Cloud are created in a Government Cloud instance.
- Scratch orgs created from a Dev Hub org in Public Cloud are created on a Public Cloud instance.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Get All Metadata API Entities with Expanded Source Tracking (Beta)

Expands your reach to the entire set of Metadata API entities when pushing and pulling source, or getting the status for your project source changes.

 **Note:** As a beta feature, Salesforce DX Expanded Source Tracking is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Expanded Source Tracking in the [Salesforce DX Trailblazer Community](#).

Right now, Salesforce DX source tracking supports some Metadata API entities but not all, as documented in [Supported Metadata API Types](#) in the *Salesforce DX Developer Guide*.

The Expanded Source Tracking beta includes these additional metadata types:

- AppMenu
- CaseSubjectParticle
- Certificate
- DataCategoryGroup
- DelegateGroup
- EclairGeoData
- EmailServicesFunction
- EmbeddedServiceBranding
- EmbeddedServiceConfig
- EmbeddedServiceLiveAgent
- GlobalValueSetTranslation

EDITIONS

Available in: **Developer, Enterprise, Group, and Professional** Editions

- InstalledPackage
- ManagedTopics
- Package
- PersonalJourneySettings
- Portal
- ProfilePasswordPolicy
- ProfileSessionSetting
- SearchSettings
- SocialCustomerServiceSettings
- StandardValueSetTranslation
- SynonymDictionary
- Territory2Settings
- TopicsForObjects

Because there isn't a direct correlation between a Setup page and each Metadata API entity, source tracking might not work exactly as you expect. For instance, when you update or save something through a Setup page, that change might not be tracked via `force:source:status` or `force:source:pull`.

To enable Expanded Source Tracking:

 **Note:** This feature doesn't affect scratch orgs that you've already created.

1. Open your Dev Hub org.
2. From Setup, enter *Dev Hub* in the Quick Find box, and select **Dev Hub**.
3. Click **Enable Expanded Source Tracking (Beta)**.
4. Add the `ExpandedSourceTracking` feature to your scratch org definition file.

```
"features": ["ExpandedSourceTracking"],
```

Packaging: Unlocked Packages (Beta) with More Supported Components and Other Enhancements

Create and manage second-generation packages, including unlocked packages, using the Salesforce CLI.



Note: As a beta feature, Second-Generation Packaging is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for second-generation packaging in the [Packaging 2 Beta Trailblazer Community](#).

To enable this beta feature, which includes managed packages and unlocked packages, enable Packaging 2 in your Dev Hub org. Locked packages are available as part of a pilot.

Name Change for Developer-Controlled Packages (DCPs)

Why make things more complicated than necessary? Unlocked DCPs and locked DCPs are now referred to as unlocked packages and locked packages, respectively.

IN THIS SECTION:

[Create and Install Unlocked Packages \(Beta\)](#)

Unlocked packages are a flexible way to organize metadata in your org.

[Protect Metadata with Locked Packages \(Pilot\)](#)

A locked package prevents direct manipulation of metadata after the package is installed. Only the package developer can modify or edit the package components after it is installed in the org.

[Install Packages from a URL](#)

You can allow users to install your second-generation package from a URL rather than the command line. It's easy to create a URL using the subscriber version package ID.

[New Packaging Options with the Salesforce CLI](#)

You have new options when you create and update packages with the Salesforce CLI.

[Control Second-Generation Packaging with User Permissions](#)

You can designate which Salesforce DX users can create and update second-generation packages in a Dev Hub org with the new Create and Update Second-Generation Packages permission.

[Packaging API Changes](#)

New and changed APIs are available to give you more control over packaging-related features.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

Create and Install Unlocked Packages (Beta)

Unlocked packages are a flexible way to organize metadata in your org.

 **Note:** As a beta feature, Unlocked Packages is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for second-generation packaging in the [Packaging 2 Beta Trailblazer Community](#).

To use this beta feature, enable Packaging 2 in your Dev Hub org.

Unlocked packages offer the following advantages.

- Support for no-namespace packages, which can help you move your unorganized metadata to packages while you implement Salesforce DX.
- Many components not previously supported by packages are now available in unlocked packages.
- You can develop unlocked packages in any Dev Hub.
- Install unlocked packages in any org using either the Salesforce CLI or a web browser.

Protect Metadata with Locked Packages (Pilot)

A locked package prevents direct manipulation of metadata after the package is installed. Only the package developer can modify or edit the package components after it is installed in the org.

 **Important:** We provide locked packages to selected customers through a pilot program that requires agreement to specific terms and conditions. Locked packages are subject to change and aren't generally available unless or until Salesforce announces their general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

This pilot is available only in sandbox and Developer Edition environments. You can install a locked package only in a sandbox or scratch org.

Want to join the pilot? This pilot is ideal for customers who are actively using Salesforce DX and are willing to provide us constructive feedback. We plan to offer this feature to a small set of customers and expand the audience over time.

To join this pilot, contact your Salesforce Account Executive or Success Manager.

IN THIS SECTION:

[Include More Components in Developer-Controlled Packages](#)

Developer-controlled packages (DCP) now support many more components, including AssignmetRule, CustomDataType, and WaveApplication.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

Include More Components in Developer-Controlled Packages

Developer-controlled packages (DCP) now support many more components, including AssignmentRule, CustomDataType, and WaveApplication.

For a complete list of supported components, see the the *Salesforce DX Developer Guide*.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in:
Enterprise, Performance, and Unlimited Editions

Scratch orgs available in:
Developer, Enterprise, Group, and Professional Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

Install Packages from a URL

You can allow users to install your second-generation package from a URL rather than the command line. It's easy to create a URL using the subscriber version package ID.

For details, see the *Salesforce DX Developer Guide*.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in:
Enterprise, Performance, and Unlimited Editions

Scratch orgs available in:
Developer, Enterprise, Group, and Professional Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

New Packaging Options with the Salesforce CLI

You have new options when you create and update packages with the Salesforce CLI.

You can create a package using the `--nonamespace (-e)` option when you run `force:package2:create`.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

```
sfdx force:package2:create -n PackageName -d 'My New Package' -o Unlocked -e
```

You can update an existing package using the new `force:package2:update` command.

Control Second-Generation Packaging with User Permissions

You can designate which Salesforce DX users can create and update second-generation packages in a Dev Hub org with the new Create and Update Second-Generation Packages permission.

For more information about user perms, see the *Salesforce DX Setup Guide*.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

Packaging API Changes

New and changed APIs are available to give you more control over packaging-related features.

Documentation was added or updated in the *Tooling API Developer Guide* for the following packaging-related entities:

- Package2 (Beta)
- Package2Member (Beta)
- Package2Version (Beta)
- Package2VersionCreateRequest (Beta)
- Package2VersionCreateRequestError (Beta)
- InstalledSubscriberPackage
- InstalledSubscriberPackageVersion
- PackageVersionUninstallRequestError
- SubscriberPackage
- SubscriberPackageVersionUninstallRequest
- SubscriberPackageVersion
- PackageInstallRequest

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

Code Smarter with Salesforce Extensions for VS Code

Salesforce Extensions for VS Code, the Salesforce extension pack for the Visual Studio Code editor, releases updates most weeks. In recent releases, we enhanced our code smartness features and made the Apex Debugger extension more robust. Here are a few highlights from the updates we've made since the extension pack went GA in mid-October 2017.

Highlights from Recent Releases

Extension Pack

We changed the name of the extension pack from Salesforce Development Tools for Visual Studio Code to Salesforce Extensions for VS Code.

salesforcedx-vscode-apex Extension

We now offer code completion for the sObjects in your scratch orgs. We also fine-tuned the Go To Definition feature so that it works from more locations in your source code.

Some notable entries from the [change log](#):

- New command—SFDX: Refresh SObject Definitions (enables code smartness in Apex for sObjects: [Read more](#))
- Add Go To Definition for class and interface usage for inner classes ([PR #258](#))
- Enable Go To Definition for usages of classes and interfaces in class and interface declarations ([PR #247](#))

salesforcedx-vscode-visualforce Extension

A new Visualforce language server provides code completion for the standard Visualforce components in your org. The Visualforce language server understands embedded JavaScript and CSS in your `.page` and `.component` files, making it easier for you to work with these languages.

Some notable entries from the [change log](#):

- Code completion for standard Visualforce components ([PR #180](#))

- Support proper formatting with Cmd+ (macOS) or Ctrl+ (Linux and Windows) in embedded CSS and JavaScript within Visualforce files ([PR #200](#))

salesforcedx-vscode-apex-debugger Extension

We continue to enhance your experience with the interactive Apex Debugger for scratch orgs.

Some notable entries from the [change log](#):

- Paginate collections in variables view ([PR #209](#))
- Configure exception breakpoints ([PR #218](#))

Resources

For information about Salesforce Extensions for VS Code and how to get started, check out the [Visual Studio Code Marketplace](#).

To request features, report issues, peruse the source code for the extension pack, or submit contributions, visit [GitHub](#).

Salesforce Extensions for VS Code is released regularly. For information about the changes in these ongoing releases, check out the extension pack's [change log](#).

Force.com IDE 2 Beta Discontinued

The Force.com IDE 2 beta release has been discontinued. We are not providing future releases of this tool, and no downloads are available after May 3, 2018. You cannot access the Force.com IDE 2 Developer Guide as of April 23, 2018.

If you're using Force.com IDE 2, we recommend that you check out our extension pack for Visual Studio Code, [Salesforce Extensions for VS Code](#).

Save Time by Cloning Sandboxes (Beta)

You can create a sandbox by cloning an existing sandbox rather than using your production org as your source. Save time by customizing a sandbox with a set of data and metadata and then replicating it. Sandbox cloning simplifies having multiple concurrent streams of work in your application life cycle. You can set up a sandbox for each type of work, such as development, testing, and staging. Your colleagues can easily clone individual sandboxes instead of sharing one sandbox and avoid stepping on each other's toes. This feature is available when the Sandbox Cloning beta begins on February 12, 2018. This change applies to both Lightning Experience and Salesforce Classic.



Note: As a beta feature, Sandbox Cloning is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Sandbox Cloning in the [IdeaExchange](#).

To clone a sandbox, from Setup, enter **Sandboxes** in the Quick Find box, then select **Sandboxes**. Click **Clone** next to the name of a completed sandbox. Or select **New Sandbox**, and select the sandbox to clone from the Create From dropdown menu.

When your new sandbox is ready, you can manage it from your production org like any other sandbox.

To clone a sandbox using the Tooling API, specify the ID of a SandboxInfo in the `SourceId` field on your new SandboxInfo object.

SEE ALSO:

[Salesforce Help: Sandbox Cloning \(Beta\)](#)

[IdeaExchange: Refresh Ability Between Sandboxes](#)

Salesforce CLI: New Commands and Easier Installation

Use the Salesforce command-line interface (CLI) to easily create environments for development and testing, synchronize source code, run tests, and control the full application life cycle. These new and changed features are available when Salesforce CLI v42 is released on February 10, 2018.

We release changes to the Salesforce CLI regularly. Read the weekly release notes to learn about recent updates in [version 42 of the CLI](#) or in the [previous version \(41\)](#).

These commands and parameters have changed in version 42 of the Salesforce CLI or during weekly updates after we published [version 41 of the Salesforce CLI Command Reference](#). For more information, see [version 42 of the Salesforce CLI Command Reference](#).

New Commands

force:apex:trigger:create

Creates skeleton Apex trigger source files.

force:auth:logout

Logs you out of orgs that you previously authorized.

force:package2:update

Updates a second-generation package.

Changed Commands

force:project:create

Generates a sample `.forceignore` file in your new project.

New Parameters

force:apex:test:run: -t | --tests

Runs individual methods of Apex test classes.

force:apex:test:run: -y | --synchronous

Runs tests from a single Apex class synchronously.

force:schema:sobject:describe: -t | --usetoolingapi

Executes with Tooling API.

force:package2:version:create: -e | --nonamespace

Creates the package with no namespace.

force:package2:version:update: -p | --noprompt

No prompt to confirm setting the package version as released.

**force:data:record:create, force:data:record:delete, force:data:record:get,
force:data:record:update, and force:data:soql:query: --perfloglevel (no short name)**

Gets data on API performance metrics from the server.

Changed Parameters

force:data:bulk:upsert: -i | --externalid

Changed from being optional to required.

Installation and Configuration Changes

The salesforcedx plug-in is bundled with the CLI.

When you install the CLI, you also get the plug-in. To check the version of the installed core salesforcedx plug-in, use the --core parameter:

```
sfdx plugins --core
```

The SFDX_DISABLE_ENCRYPTION environment variable is no longer supported.

The variable was deprecated in the previous release.

ISVforce: AppExchange Trailblazer Scorecard and Packaging Enhancements

The AppExchange Trailblazer Scorecard tracks achievements on your partner journey and makes recommendations to help you grow your Salesforce business. We also made packaging enhancements to give you more control over the AppExchange products that you distribute.

Editions

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Get the Same Behavior for Global Value Sets and Standard Value Sets in Managed Package Upgrades](#)

The behavior of global values sets in managed package upgrades is now consistent with the behavior of standard value sets for easier maintenance.

[Refresh Components List in Package Details as Needed](#)

ISVs with packages that contain over 1,000 components can decide when to refresh the components list in the Package Details and avoid a long wait while this page loads. The components list continues to refresh automatically for packages with less than 1,000 components.

[Change Package Primary Contact](#)

The Primary Contact name is visible to ISVs from the Push Package Upgrade page, where it initially displays the name of the person who installed the package in a subscriber org. Previously, it could not be changed. If you have the Download AppExchange Packages permission, you can now choose **Become Primary Contact** from the Installed Packages page to become the primary contact for a package.

[Remove Deprecated Package Archives](#)

ISVs can now request that Salesforce delete zip files for old versions of a managed package, if needed for data privacy reasons.

[Create Partner Edition Scratch Orgs](#)

When creating scratch orgs from a Dev Hub in a partner business org, partners have access to these editions: Partner Developer, Partner Enterprise, Partner Group, and Partner Professional. This feature is available when Salesforce CLI v42 is released on February 10, 2018.

[Package Approval Status Displays Before Installation](#)

During the package install process, a notification informs customers whether the AppExchange Partner Program has authorized your package. The notification displays if the package hasn't passed security review or isn't authorized for distribution for another reason. If the AppExchange Partner Program has approved and authorized your package, we don't display the notification.

[Grow Your Business Faster with the AppExchange Trailblazer Scorecard](#)

The AppExchange Trailblazer Scorecard takes the guesswork out of growing your Salesforce business. The scorecard shows you goals and milestones on the journey to AppExchange, summarizes your progress, and recommends steps for taking your business to the next level.

[Accept Bank Payments in AppExchange Checkout](#)

Many enterprise-scale customers prefer to make purchases with bank accounts instead of credit cards. Now, you can accept bank payments from checking, savings, and money market accounts on your AppExchange Checkout listings.

SEE ALSO:

[Use Free ISV Customer Debugger Sessions Along with Purchased Apex Debugger Sessions](#)

Get the Same Behavior for Global Value Sets and Standard Value Sets in Managed Package Upgrades

The behavior of global values sets in managed package upgrades is now consistent with the behavior of standard value sets for easier maintenance.

We changed the behavior of global value sets in managed package upgrades to match the behavior of standard value sets.

- Label and API names for individual values don't change in subscriber orgs. This behavior is new in this release.
- New values aren't added to the subscriber orgs.
- Active and Inactive value settings in the subscriber orgs don't change.
- Default values in the subscriber orgs don't change.
- Global value set label names change if the package upgrade includes a new label value.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

SEE ALSO:

[Fields and Picklists: Time Field Type Beta and Picklist Conversion Enhancement for Record Types](#)

Refresh Components List in Package Details as Needed

ISVs with packages that contain over 1,000 components can decide when to refresh the components list in the Package Details and avoid a long wait while this page loads. The components list continues to refresh automatically for packages with less than 1,000 components.

Package components frequently depend on other components that aren't always added to the package explicitly. Each time you change a package, Salesforce checks for dependencies and displays the components as package members. Package Manager automatically checks for dependencies and shows the component relationship to the package in the Include By column of the Package Details.

If your managed package contains 1,000 or more components, the Package Details page now displays a Refresh Components option. Previously, the list refreshed every time you opened an existing package, causing a delay while it checked for changes to populate the Included By column.

Click **Refresh Components** if the package has new or changed components and wait for the list to refresh.

The screenshot shows the 'Package Detail' page for a package named 'Test Mgd Pkg'. The 'Components' tab is selected, displaying a list of components including 'All', 'Foo', 'Foo', 'Foo Layout', and 'My Field'. A red box highlights the 'Refresh Components' button at the top right of the component list.

Action	Name	Parent Object	Type	Included By	Available in Versions
All		Foo	List View	Previously Released	1.0 - Current
Foo			Custom Object	Previously Released	1.0 - Current
Foo			Tab	Previously Released	1.0 - Current
Foo Layout		Foo	Page Layout	Previously Released	1.0 - Current
My Field		Foo	Custom Field	Refresh to view	

Change Package Primary Contact

The Primary Contact name is visible to ISVs from the Push Package Upgrade page, where it initially displays the name of the person who installed the package in a subscriber org. Previously, it could not be changed. If you have the Download AppExchange Packages permission, you can now choose **Become Primary Contact** from the Installed Packages page to become the primary contact for a package.

Remove Deprecated Package Archives

ISVs can now request that Salesforce delete zip files for old versions of a managed package, if needed for data privacy reasons.

SEE ALSO:

[Salesforce Help: Data Deletion for the Salesforce Platform](#)

Create Partner Edition Scratch Orgs

When creating scratch orgs from a Dev Hub in a partner business org, partners have access to these editions: Partner Developer, Partner Enterprise, Partner Group, and Partner Professional. This feature is available when Salesforce CLI v42 is released on February 10, 2018.

For more information, see [Supported Scratch Org Editions for Partners](#) in the *ISVforce Guide*.

Package Approval Status Displays Before Installation

During the package install process, a notification informs customers whether the AppExchange Partner Program has authorized your package. The notification displays if the package hasn't passed security review or isn't authorized for distribution for another reason. If the AppExchange Partner Program has approved and authorized your package, we don't display the notification.

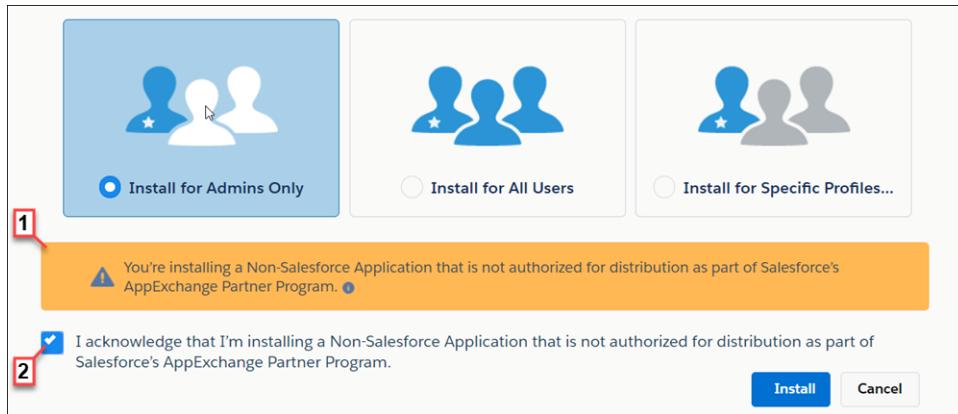
Editions

Available in: Salesforce Classic and Lightning Experience

Dev Hub available in: **Enterprise, Performance, and Unlimited** Editions

Scratch orgs available in: **Developer, Enterprise, Group, and Professional** Editions

Partner-specific scratch orgs available in: **Partner Developer, Partner Enterprise, Partner Group, and Partner Professional** Editions

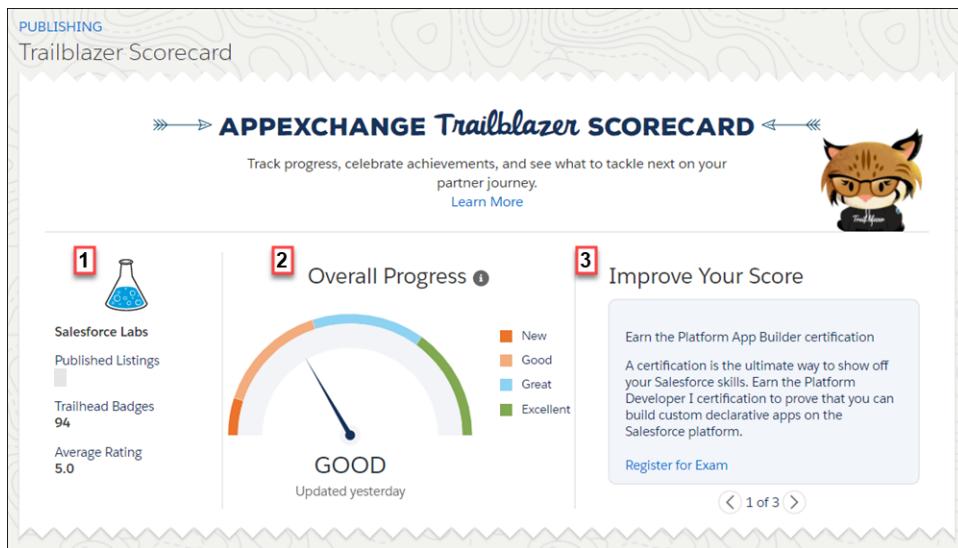


The notification appears when customers configure the package installation settings (1). Before customers install the package, they must confirm that they understand that the package isn't authorized for distribution (2).

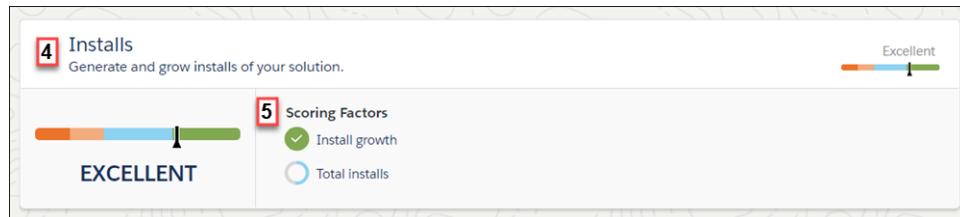
For information about the AppExchange Partner Program and its requirements, visit the [Salesforce Partner Community](#).

Grow Your Business Faster with the AppExchange Trailblazer Scorecard

The AppExchange Trailblazer Scorecard takes the guesswork out of growing your Salesforce business. The scorecard shows you goals and milestones on the journey to AppExchange, summarizes your progress, and recommends steps for taking your business to the next level.



Overall progress and recommendations for your company appear at the top of the scorecard. The Company Details element (1) provides metrics related to the health of your Salesforce business, such as the average rating of your product. The Overall Progress element (2) shows your cumulative scorecard progress based on achievements along the partner journey, such as passing security review. The Recommendations element (3) tells you the top three actions that you can take to boost your score, such as getting Salesforce certified.



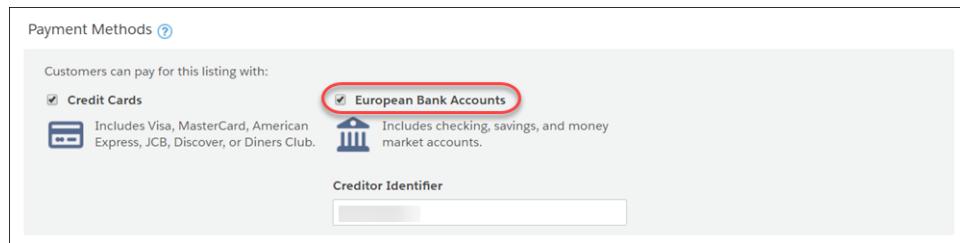
To determine overall progress, we measure your company's progress in categories that represent important aspects of the partnership experience. For example, the Installs category (4) looks at how often customers install your product and whether installs grow year-over-year (5). To learn more about the categories that we consider and how they impact your score, see the [ISVforce Guide](#).

To view your company's scorecard, go to the Publishing Console in the Partner Community. If you're the Partner Community admin at your company, you have access to the scorecard by default. Assign the Manage Listings permission to provide access to other members of your team.

Accept Bank Payments in AppExchange Checkout

Many enterprise-scale customers prefer to make purchases with bank accounts instead of credit cards. Now, you can accept bank payments from checking, savings, and money market accounts on your AppExchange Checkout listings.

Depending on your location, you can accept payments from US or European bank accounts. If your company is based in the US, you can accept payments from US bank accounts through the Automated Clearing House (ACH) network. If your company is based in the European Union, you can accept payments from European bank accounts under the Single Euro Payments Area (SEPA) framework. You can't accept both ACH and SEPA payments on a listing.



You can enable bank payments on the Pricing tab of the AppExchange Publishing Console. Before you enable this payment method, first activate ACH Credit Transfer or SEPA Direct Debit in Stripe. After Stripe approves the request, you're eligible to receive bank payments on your listing. For more setup details, see the [ISVforce Guide](#).

Enterprise Messaging: Change Data Capture Enhancements, High-Volume Platform Events, and Better Connection Handling in Streaming API

Use events to simplify communication between business systems. With the Change Data Capture pilot, receive real-time notifications of record changes in Salesforce. With the High-Volume Platform Events pilot, deliver and receive millions of custom events efficiently.

IN THIS SECTION:

[Keep Your External Data up to Date with Change Data Capture \(Pilot\)](#)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes data change events, which represent changes to Salesforce records. Changes include creation of a new record, updates to an existing record, deletion of a record, and undeletion of a record.

[Deliver Millions of Events Per Day with High-Volume Platform Events \(Pilot\)](#)

Scale your event-based applications with high-volume platform events and deliver more events than with platform events. This change applies to both Lightning Experience and Salesforce Classic.

[Handle Invalid Connections in Streaming API](#)

A Streaming API client is now notified with an error when the client authentication is invalidated. After receiving the error, the client can reauthenticate and reconnect to receive new events. Otherwise, the client doesn't receive events. This change applies to all API versions.

Keep Your External Data up to Date with Change Data Capture (Pilot)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes data change events, which represent changes to Salesforce records. Changes include creation of a new record, updates to an existing record, deletion of a record, and undeletion of a record.

EDITIONS

Available in: **Performance**,
Unlimited, **Enterprise**, and
Developer Editions



Note: We provide Change Data Capture to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Change Data Capture isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Change Data Capture in this [Trailblazer Community group](#).

For example, you have a human resource (HR) system with copies of employee custom object records from Salesforce. You can synchronize the employee records in the HR system by receiving data change events from Salesforce. After receiving the events, you can process the corresponding insert, update, delete, or undelete operations in the HR system. Because the changes are received in near real time, the data in your HR system stays up to date.

Data change events are available for all custom objects defined in your Salesforce org. Events for a custom object aren't published until you enable them for that object. Data change events are available and automatically enabled for a subset of standard objects. Data change events are published on a channel (the event bus) when changes occur in Salesforce.



Example: This data change event is sent when an account is created.

```
{
  "data": {
    "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
    "payload": {
      "ChangeEventHeader": {
        "entityName": "Account",
        "recordIds": [
          "001R0000002av0B"
        ],
        "changeType": "CREATE",
        "changeOrigin": "com.salesforce.core",
        "changeTime": "2017-04-18T14:45:00Z"
      }
    }
  }
}
```

```

    "transactionKey": "001b7375-0086-250e-e6ca-b99bc3a8b69f",
    "sequenceNumber": 1,
    "isTransactionEnd": true,
    "commitTimestamp": 1501010206653,
    "commitNumber": 92847272780,
    "commitUser": "<User_ID>"
},
{
  "Name": "Acme",
  "Description": "Everyone is talking about the cloud. But what does it mean?",
  "OwnerId": "<Owner_ID>",
  "CreatedDate": "2017-11-30T19:16:44Z",
  "CreatedBy": "<User_ID>",
  "LastModifiedDate": "2017-11-30T19:16:44Z",
  "LastModifiedBy": "<User_ID>"
},
{
  "event": {
    "replayId": 6
  }
},
{
  "channel": "/data/ChangeEvents"
}

```

The Data Change Capture pilot was introduced in the last release. In this release, we made these enhancements.

Support for New Standard Objects

In addition to standard objects previously supported, Data Change Capture now supports these standard objects.

- Event
- EventRelation
- Task
- TaskRelation
- Person Account

You can receive data change events for single and recurring tasks and calendar events, including events with invitees. Each activity occurrence and event invitee are tracked by individual data change events. If Shared Activities is enabled, the relationships between a task and its parent records (for example, contacts or lead), which correspond to TaskRelation objects, are tracked through change events. Similarly, the relationships between a calendar event and its parent records, which correspond to EventRelation objects, are also tracked. If Shared Activities isn't enabled, EventRelation objects represent relationships to invitees and are tracked by change events.

If Person Accounts is enabled, data change events are generated for any change in a person account. Because a person account record combines fields from an account and a contact, a change in a person account results in two data change events: one change event for the account record and another for the contact record.

Gap Events



Note: Gap Events are enabled separately from the Change Data Capture (Pilot) feature. To enable Gap Events, contact Salesforce.

Change Data Capture tracks record operations that are part of transactions in Salesforce application servers by generating data change events. However, some operations are applied directly in the database outside of a transaction in the Salesforce application servers. For example, archiving activities or a data cleanup job in the database. To not miss these operations, gap events are generated to capture the changes.

A gap event contains information about the change in the header, such as the change type (with a prefix of `GAP_`) and record ID. But a gap event doesn't contain details about the change, such as record fields. When your app receives a gap event message, it can retrieve the Salesforce record. The app uses the record ID value to get the current data for your system.

Overflow Events

To capture changes more efficiently, overflow events are generated for single transactions that contain many changes. Overflow events are generated when a single transaction contains more than 100,000 changes for the records that are above the 100,000-change threshold. An overflow event contains less information about a change than a data change event. An overflow event has a `changeType` field header value of `GAP_OVERFLOW` instead of the specific type of change. It also contains the object type in the `entityName` field. An overflow event doesn't include details about the change, such as record fields or the record ID.

Transactions with a high volume of operations are not frequent, but they can occur in some situations. For example, the creation of a recurring event with hundreds of occurrences and hundreds of attendees. Or a cascade delete of accounts that are associated with many opportunities, contacts, and activities, which results in deleting many more records in the same transaction.

Deliver Millions of Events Per Day with High-Volume Platform Events (Pilot)

Scale your event-based applications with high-volume platform events and deliver more events than with platform events. This change applies to both Lightning Experience and Salesforce Classic.

 **Note:** We provide High-Volume Platform Events to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. High-Volume Platform Events isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for High-Volume Platform Events in this [Trailblazer Community group](#).

Editions

Available in: **Performance**, **Unlimited**, and **Enterprise** Editions

Define High-Volume Platform Events

When you create the definition of a platform event, you specify the event type as high volume. You can define a high-volume platform event from the user interface or through Metadata API. From the UI, in Setup, enter `Platform Events` in the Quick Find box, then select **Platform Events**. When completing the standard fields, select **High Volume** for Event Type.

In Metadata API, the event definition is represented in the `CustomObject` type with `eventType` set to `HighVolume`.

Publish and Subscribe to High-Volume Event Messages

Publish and subscribe to high-volume platform events in the same way you publish and subscribe to standard-volume platform events. You can use declarative tools, such as Process Builder and flow, or write code with Apex and CometD API apps.

Event Allocations

Allocations for high-volume platform events are set upon acceptance into the pilot program on a case-by-case basis. Allocations include:

- Maximum number of event notifications published per hour

- Maximum number of event notifications delivered to CometD clients within a 24-hour period

SEE ALSO:

[Platform Events Developer Guide](#)

Handle Invalid Connections in Streaming API

A Streaming API client is now notified with an error when the client authentication is invalidated.

After receiving the error, the client can reauthenticate and reconnect to receive new events.

Otherwise, the client doesn't receive events. This change applies to all API versions.

A Streaming API client uses CometD and the Bayeux protocol to subscribe to events, including PushTopic events, generic events, and platform events. Client authentication can sometimes become invalid, for example, when the OAuth token is revoked, or a Salesforce admin invalidates the session. An administrator can revoke an OAuth token or delete a Salesforce session to prevent a client from receiving events. Sometimes a client can inadvertently invalidate its authentication by logging out from a Salesforce session.

Streaming API regularly validates the OAuth token or session ID while the client is connected. If the token or session is no longer valid, a Bayeux message is sent on the `/meta/connect` channel with an error value of `401::Authentication invalid`. The message contains the `reconnect=none` value in the `advice` field.

 **Note:** If the OAuth or session token is not sent in the request header, the 401 error message text is `401::Request requires authentication`.

 **Example:** The error response message that is sent on the `/meta/connect` channel looks similar to the following.

```
{
  "clientId": "1q1ib66fvm7kli1gfoauu95i78g",
  "advice": {
    "reconnect": "none",
    "interval": 0
  },
  "channel": "/meta/connect",
  "id": 7,
  "error": "401::Authentication invalid",
  "successful": false
}
```

If the client is required to perform a new handshake request due to a failed connection, the authentication error is sent on the `/meta/handshake` channel. The handshake request fails with a `403::Handshake denied` error in the response. The `401::Authentication invalid` error is nested in the `ext` property in the response.

 **Example:** The error response message that is sent on the `/meta/handshake` channel looks similar to the following.

```
{
  "ext": {
    "sfdc": {
      "failureReason": "401::Authentication invalid"
    }
  },
  "advice": {
    "reconnect": "none"
  },
  "channel": "/meta/handshake",
```

EDITIONS

Available in: **Performance**,
Unlimited, **Enterprise**, and
Developer Editions

```
    "error": "403::Handshake denied",
    "successful": false
}
```



Note: Invalidated client authentication doesn't include Salesforce session expiration. The Salesforce session never expires in a CometD client. Salesforce keeps extending the timeout interval as long as the client stays connected.

Critical Updates

This release includes new critical updates for `@AuraEnabled` Apex controllers, communities and portals, flows, and the URLs used for Visualforce, Community Builder, Site.com Studio, and content files. And we're enforcing the critical update that revokes API access from `<lightning:container>`.

To ensure a smooth transition, each critical update has an opt-in period, which ends on the auto-activation date that's displayed on the Critical Updates page in Setup. During this period, you can manually activate and deactivate the update as often as you need to evaluate the impact on your org and modify affected customizations. After the opt-in period has passed, the update is activated. For more details, see [Respond to Critical Updates](#).

New Critical Updates

These critical updates are new in Spring '18.

[Enable the New URL Format for Lightning Experience and the Salesforce Mobile App \(Critical Update\)](#)

We're changing the URL format used by Lightning Experience standard apps and the Salesforce mobile app. The new URL format is more readable and addresses the issue of being directed to an unexpected location when accessing Lightning Experience URLs before authenticating. This update doesn't apply to Lightning Experience console apps and communities.

[Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing \(Critical Update\)](#)

This critical update changes the behavior of `@AuraEnabled` Apex controllers that don't specify `with sharing` or `without sharing` to default to `without sharing`. This change relaxes the security for controllers that don't explicitly set sharing behavior using these keywords. It's a best practice to **always** use `with sharing` in Apex controllers used with Lightning components.

[Execute All Autolaunched Flow Interviews When Invoked in Bulk \(Critical Update\)](#)

When flow interviews are invoked in bulk, they are now all executed. Previously, when multiple flow interviews were invoked in bulk, only the first interview was started and executed; the remaining interviews were discarded.

[Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

We're stabilizing the hostname of Visualforce, Community Builder, Site.com Studio, and content file URLs by removing instance names from URLs. This critical update applies to orgs that have a deployed My Domain. It will be activated automatically on March 16, 2019.

[Enable the Lightning Console UI Theme \(Critical Update\)](#)

This critical update enables Lightning Console's exclusive UI Theme `Theme4u`, and will be activated automatically on October 5, 2018. Currently, `$User.UITheme` or `$User.UIThemeDisplayed` returns `Theme4d` for Visualforce pages in standard Lightning Experience apps and Lightning Console apps. Once the critical update is activated, Lightning Console apps return `Theme4u`, allowing Visualforce pages to differentiate between standard Lightning Experience apps and Lightning Console apps.

Enforced Critical Updates

[API Access for <lightning:container> Apps Is Revoked \(Critical Update\)](#)

API Access for <lightning:container> Apps Is Revoked was a critical update for Winter '18 and will be enforced for all orgs on February 10, 2018. Lightning apps that use <lightning:container> will no longer have access to the REST APIs from inside the iframe. Apps can still access org data through Apex remoting calls.

Postponed Critical Updates

["Stop Automated Field Updates from Suppressing Email Notifications" Critical Update Postponed](#)

This critical update, released in Summer '17, was scheduled for auto-activation on June 1, 2018, but has been postponed to February 28, 2019.

Help and Training

We updated our limits documentation. We added Trailhead modules, instructional videos, and walkthroughs. We also updated our Trust and Compliance documentation.

IN THIS SECTION:

[Find Allocations and Limits Information Quickly](#)

Find what you need when you need it with more ease. When you search for an edition-specific constraint, such as the number of API calls that you receive with Enterprise Edition, look for the term "allocation." Looking for an actual limit, like the maximum execution time for each Apex transaction? In this case, use the term "limit."

[Choose to Send Contact Information with Your Feedback](#)

When you give feedback to Salesforce via the Help menu, you can choose to send your contact information. This change applies to Lightning Experience only.

[Explore Features with Trailhead](#)

Looking for a good way to get familiar with Salesforce or discover a new feature? Meet Trailhead, a fun, guided, and interactive tool to learn Salesforce. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

[Watch Videos \(English Only\)](#)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

[Walk Through Tasks and Features](#)

A walkthrough is a series of interactive steps that guide you through a task or feature. Before you start a walkthrough, make sure that you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce.

[The Visual Workflow Guide Has a New Name](#)

We renamed the *Visual Workflow Guide* to the *Cloud Flow Designer Guide*.

[Review Trust and Compliance Documentation](#)

We made seasonal updates to the Salesforce Trust and Compliance Documents.

Find Allocations and Limits Information Quickly

Find what you need when you need it with more ease. When you search for an edition-specific constraint, such as the number of API calls that you receive with Enterprise Edition, look for the term “allocation.” Looking for an actual limit, like the maximum execution time for each Apex transaction? In this case, use the term “limit.”

We placed most allocation and limit information near the feature areas that they impact. To review the general allocations specific to your edition start by looking at [Salesforce Features and Edition Allocations](#). The [Salesforce Limits Quick Reference Guide](#) is now also leaner and more focused on what developers need.

Choose to Send Contact Information with Your Feedback

When you give feedback to Salesforce via the Help menu, you can choose to send your contact information. This change applies to Lightning Experience only.

We always appreciate feedback, and sometimes we want to contact you about your comments and questions. When you send us your thoughts through the feedback link in the Help menu, you can choose to include your contact information.

The screenshot shows the Salesforce Help & Training page. On the left, there's a sidebar with various links like 'Get Started with Salesforce', 'Welcome to the Lightning Experience (English Only)', etc. Below that is a section titled 'LEARN MORE WITH TRAILHEAD' with links to 'Make the Move to Lightning Experience', 'Get Started with Lightning Experience', and 'Go to Trailhead'. At the bottom of this sidebar, there are links for 'Get Support', 'Give Feedback about Salesforce' (which is circled in red), and 'View Keyboard Shortcuts'. A small icon for 'Spring '18 Release Notes' is also present. On the right, a large modal window titled 'Give Feedback about Salesforce' is open. It contains a text area with placeholder text 'Max 4000 chars.' and a checkbox with the text 'Contact me about my feedback. I understand that Salesforce will receive and can use my name, email address, and user ID to contact me.' This checkbox is also circled in red. At the bottom of the modal are 'Cancel' and 'Submit' buttons.

Explore Features with Trailhead

Looking for a good way to get familiar with Salesforce or discover a new feature? Meet Trailhead, a fun, guided, and interactive tool to learn Salesforce. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Check out Trailhead at <https://trailhead.salesforce.com>, and find the right trail for you. Here are the latest modules.

New Modules

Event Monitoring Analytics App

Use a powerful prebuilt app to visualize your Salesforce event log data.

Channel Order App Basics

Use the Channel Order App to submit and manage customer orders.

Analytics App Template Development

Use templates to distribute Einstein Analytics apps to your partners and customers.

Marketing Cloud for Consulting Partners

Launch a Marketing Cloud practice to grow your business.

Updated Modules

Service Cloud Basics

Changed the title from *Service Cloud Basics for Lightning Experience* to *Service Cloud Basics*. Refreshed the content to include two new units to help you begin your customer service journey.

Service Cloud Basics for Salesforce Classic

Updated the title to include *Salesforce Classic*.

New Projects

Build a Custom Theme Layout Component for Lightning Communities

Customize your Lightning community with a theme layout component.

New Trails

Increase Sales Efficiency with Territory Management

Help your sales team keep track of who's assigned to each account and opportunity.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new video [Take Control of Duplicates—Use Duplicate Rules and the Potential Duplicates Component](#) shows how Salesforce helps you keep duplicate records under control. Salesforce alerts sales reps to duplicates of records they view, warns sales reps when they're about to create a duplicate, or blocks new duplicates altogether. Plus, find out how to optimize a duplicate rule for custom fields and company workflow. Extra details in the companion blog post [Deal with Duplicates: Two Tactics to Use Today](#).
- The new [Use Matching Rules to Hunt Down Duplicate Records](#) video shows what to do when the standard matching rules miss duplicates in your data. Close the gap by creating custom matching rules.
- The new [How to Create a Custom Field \(Salesforce Lightning\)](#) video walks you through how to create a custom picklist field, from choosing the correct field type to applying field-level security.
- The new [Salesforce Files in Lightning Experience](#) video provides a quick checklist to help get your Classic notes into Lightning Experience for a richer experience for your users. Also check out the [Pro Tip: Simplify File Management with Salesforce Files in Lightning Experience](#) and [Pro Tip: Boost Note-Taking with Enhanced Notes in Lightning Experience](#) companion blogs.
- The updated [Who Sees What: Object Access \(Salesforce Lightning\)](#) video contains steps to access the Enhanced Profile User Interface via the new User Management Settings page.
- The updated [Introduction to Analytics Explorer](#) video covers changes made to the explorer in the Spring '18 release.

- The new  [Personalize, Collaborate, and Take Action from the Analytics Tab](#) video teaches how to drill into your data to answer your own questions and then collaborate and take action directly from the Analytics tab..
- The new  [Build Unique Einstein Analytics Apps in the Analytics Studio](#) video shows you how to build apps from scratch in order to share the right Analytics assets with the right users.

Walk Through Tasks and Features

A walkthrough is a series of interactive steps that guide you through a task or feature. Before you start a walkthrough, make sure that you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce.

 **Important:** A walkthrough guides you through your own Salesforce account, so you're actually changing the data in your org as you go through the steps. If you're concerned about changing the data, follow the walkthrough in a sandbox account or other test environment.

Feature	Walkthroughs	You'll need...	Available in these languages
Einstein Analytics Explorer	 Walk Through It: Welcome to the Einstein Explorer	To be in the Analytics Studio	English

The *Visual Workflow Guide* Has a New Name

We renamed the *Visual Workflow Guide* to the *Cloud Flow Designer Guide*.

SEE ALSO:

[Cloud Flow Designer Guide](#)

Review Trust and Compliance Documentation

We made seasonal updates to the Salesforce Trust and Compliance Documents.

Infrastructure and Sub-Processors

The following changes have been made in the **Infrastructure and Sub-Processors Documentation**:

Salesforce

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document. Removed Sales Cloud Einstein from scope and moved it to separate set of documentation that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language; for uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.
- **Customer Data Storage:** Updated locations of EU data center instances.

Commerce Cloud

- No substantive changes

Data.com

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document.

Einstein Vision and Language

- Replaced the stand-alone Einstein Vision and Language Infrastructure and Sub-processors document with a combined document that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language. For uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.

Einstein Engagement Scoring

- Replaced the stand-alone Einstein Engagement Infrastructure and Sub-processors document with a combined document that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language. For uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.

Heroku

- No substantive changes.

IOT Cloud

- No substantive changes.

Marketing Cloud

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document.

Pardot

- No substantive changes

Salesforce DMP

- Updated to reflect branding changes.

Notices and Licenses

The following changes have been made in the **Notices and Licenses Documentation**:

Salesforce

- Updated to reflect branding changes.

Commerce Cloud

- Added Data Resource Usage, Restricted Uses, and Cooperation sections.
- **Third Party Notices:** Updated with additional features available in Digital.

Data.com

- **Data.com Data:** Updated information.

Desk.com

- **Third Party Applications:** Updated information.

Einstein Analytics

- **Third Party Notices:** Updated information.

Einstein Discovery

- **Third Party Notices:** Updated information.

Einstein Engagement Scoring

- **Service Covered:** Updated scope. Document merged with Sales Cloud Einstein and Einstein Vision and Language NLIs.
- **Third Party Notices:** Updated information.

Einstein Vision and Language

- **Service Covered:** Updated scope. Document merged with Sales Cloud Einstein and Einstein Engagement Scoring NLIs.
- **Third Party Notices:** Updated information.

ExactTarget

- Updated to reflect branding changes.
- **Restricted Uses of Information:** Updated information.

Heroku

- Added Interoperations with Other Services section.

IoT Cloud

- **Services Covered:** Updated information.
- Added Interoperations with Other Services section.

LiveMessage

- **Restricted Uses of Information:** Updated information.

Marketing Cloud (Radian6, Social Studio, Social.com)

- **Third Party Notices:** Updated information.

Pardot

- No updates.

Predictive Intelligence

- Updated to reflect branding changes.

Quip

- **Third Party Platforms:** Section renamed and updated information.

SalesforceIQ

- **Contact Enrichment Providers:** Updated information.
- **Third Party Applications:** Updated information.
- **Distributed Software:** Added direct links to Salesforce Inbox EULA for iOS and Android.
- **Third Party Notices:** Updated information.

Sales Cloud Einstein

- **Service Covered:** Updated scope. Document merged with Einstein Vision and Language and Einstein Engagement Scoring NLIs.
- **Account Intelligence Features:** Updated information.
- **Distributed Software:** Added direct links to Salesforce Inbox EULA for iOS and Android.

Salesforce DMP

- **Services Covered:** Updated to reflect branding changes.
- **Restricted Uses of Information and Compliance with Self-Regulatory Programs:** Updated information.

Security, Privacy, and Architecture

The following changes have been made in the **Security, Privacy, and Architecture Documentation**:

Salesforce

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document. Removed Sales Cloud Einstein from scope and moved it to separate set of documentation that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language; for uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.
- **Customer Data Storage:** Updated locations of EU data center instances.

Commerce Cloud

- No substantive changes

Data.com

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document.

Einstein Vision and Language

- Replaced the stand-alone Einstein Vision and Language Infrastructure and Sub-processors document with a combined document that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language. For uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.

Einstein Engagement Scoring

- Replaced the stand-alone Einstein Engagement Infrastructure and Sub-processors document with a combined document that also includes Sales Cloud Einstein, Einstein Engagement Scoring, and Einstein Vision and Language. For uniformity and to enable consolidation, descriptions in certain sections may vary from the original language.

Heroku

- No substantive changes.

IOT Cloud

- No substantive changes.

Marketing Cloud

- **Scope:** Updated services covered for accuracy, and made conforming changes throughout document.

Pardot

- No substantive changes

Salesforce DMP

- Updated to reflect branding changes.

Other Salesforce Products and Services

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).

LiveMessage

LiveMessage allows your service agents to receive inbound text messages from your customers on the same landline or 800 number that customers use to call. Agents can also initiate outbound text messages to your customers for proactive communications, meeting your customers wherever they are.

For information on new features, go to the [LiveMessage release page](#).

Success Cloud

The certified experts, consultants, and innovative tools of Salesforce Success Cloud are here to help with professional services, prescriptive advice, and expertise at every stage of your journey.