

# Salesforce Spring '16 Release Notes

Salesforce, Spring '16

Go faster than ever before with the Customer Success Platform





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## SALESFORCE SPRING '16 RELEASE NOTES

Take action quickly with the Spring '16 release. Do more from your phone. Predict what customers want with enhanced, interactive charts in Salesforce1. Accelerate productivity for partners and developers with community dashboards and our secure scalable platform. Leverage the power of the Customer Success Platform to grow your business faster than ever before.

#### IN THIS SECTION:

#### How to Use the Release Notes

The release notes give you brief, high-level descriptions of new Salesforce features and enhancements to existing features. You also get setup information, implementation 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 '16 affect all users immediately after the release goes live. You may want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

#### Lightning Experience: A New, Modern, Intelligent User Experience

It's here ... the new Salesforce 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. Learn about the benefits of this intuitive, efficient interface. Then decide when it's time to make the switch—the power is in your hands. (If you used person accounts in your production org before now, Lightning Experience is available within 24 hours after the Spring '16 release. Otherwise there's no wait.)

#### Financial Services Cloud: The Platform for High-Touch Relationship Management (Generally Available)

Today's digitally connected investors expect personalized outreach, proactive insights, and goals-based advice from their financial advisors. Salesforce Financial Services Cloud delivers the technology to accelerate your advisors' productivity, helping them engage with clients like never before and build deeper, lasting, more profitable relationships.

#### Health Cloud: Deliver Collaborative, Connected Patient Care (Generally Available)

Delivering outstanding patient care means more than simply managing the information and events that involve patients. Health Cloud reinvents the way that care coordinators engage with patients.

#### Sales: Opportunities, Campaigns, and More

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activities that need their attention. And help your sales teams increase their sales productivity in Lightning Experience.

#### Analytics

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

#### Service: Hello Field Service for Agents, Goodbye Routine Setup Tasks for Admins

Extend your support team's service out into the field with work orders. Set up knowledge faster with an automatically created article type and standard page layouts, and set up social service without contacting Salesforce or searching for settings.

#### Mobile: Do More On the Go

Office? Who needs an office? It keeps getting easier to do what needs doing, from anywhere your sales reps and service agents find themselves. The Salesforce1 mobile app is smarter these days with the enhanced, interactive charts from Lightning Experience, plus new support for objects that keep track of products purchased from you and work orders performed for your customers. And everyone benefits from the reimagined, easy-to-use Salesforce Authenticator mobile app. Our new two-factor authentication app gives your org the strong protection it needs without requiring your users to jump through inconvenient and time-wasting hoops.

#### Communities: Chatter in Communities, Template Improvements, Enhanced Moderation, and Much More

Spring '16 is packed with changes that make templates even more customizable. You can show more Salesforce data with custom object pages, create records using global actions, and manage your community's pages more easily. Plus, you can now add full Chatter capabilities to your community with Chatter Lightning components. These features are available in Salesforce Classic only. Other than in Setup, Communities is not supported in Lightning Experience.

#### Chatter: Broadcast Groups, Banner Photos, Edit More Posts

Create broadcast groups, enjoy banner photos for users and groups, and edit posts with files and links. There are more improvements for groups, user profiles, feeds, and personal digest emails.

#### Files: Share Files in Lightning, Use Files Without Chatter, and More

Files now works whether Chatter is on or off. Share files with people and groups in Lightning Experience. Manage access to files in new ways. Navigate your libraries in Files Home, and your Files Connect external sources when selecting files to post in Lightning. Devour this section to learn about all these juicy new features and more!

#### Search: Finding Information

Help your users quickly find the information they need. Some Spring '16 search changes will be immediately noticed (and appreciated) by users, such as search term spell correction. In Lightning Experience, we're introducing search results sorting, enhanced formatting for instant results, expanded lineup of searchable objects, and a new button for custom objects and records inside lookups. Behind the scenes but still enhancing the search experience is expanded scope for synonym groups.

#### Data.com: Prospecting in Lightning Experience, Critical Company Info for Leads, and More

Several key Data.com Prospector features are now available in Lightning Experience, including Company Hierarchy, Prospecting Insights, and the ability to discover contacts for accounts. Also in this release, Data.com Premium Clean customers can now automatically enrich leads with valuable company details.

#### Customization: Easier Setup, Object Management and Flows, and Much More

We've got some key Lightning Experience enhancements—the ability to update your users' navigation menus and more resources dedicated to helping you migrate. Picklists are getting better and better with new restricted picklists and improved global picklists. And for you Process Builder mavens, a new drag-and-drop interaction makes reordering the contents of your process easy as 1-2-3.

#### Security and Identity: Better Authentication, Flexible Transaction Policies, More Encryption Coverage

We've improved two-factor authentication and added verification history. You can create your own authentication provider plugin. Your transaction policies can now use external web services, so you don't have to write a lot of policy-specific code. And Platform Encryption is now available to protect data in Communities.

#### Deployment

You now have new ways to deploy changes to your Salesforce org. Deployment changes include test options for change sets. Sandbox enhancements include a new sandbox copy engine and increased Developer Sandbox licenses.

#### Development: Create Your Own Salesforce App

Force.com helps you develop new applications and integrations to help your organization or for resale to other organizations.

#### Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer-leveraging data from any source, and plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time, and measure the impact of each interaction on your business so you can optimize your approach in real time and deliver better results.

#### Salesforce Overall: Lightning Experience Changes and More

Improve your overall Salesforce experience with the ability to change owners for more records in Lightning Experience. Plus, all new orgs now come with duplicate record management features turned on.

#### Critical Updates

This release includes updates that improve the performance, logic, and usability of Salesforce but might affect your existing customizations.

#### Help and Training

We offer more engaging content and improved limits documentation. We added walkthroughs and Trailhead modules and added and updated instructional videos. We also updated some of our trust and compliance documents.

Other Salesforce Products

## How to Use the Release Notes

The release notes give you brief, high-level descriptions of new Salesforce features and enhancements to existing features. You also get setup information, implementation tips to help you get started, and best practices to ensure your continued success.

- You can choose from PDF and HTML versions.
- By default, your browser's language settings determine the language we show you in the HTML release notes. You can easily change
  the language that you're viewing the release notes in. Scroll to the footer at the bottom of the page, click **Change Language**, and
  select a language.
- These release notes are about new and modified features, not known issues. For information about known issues, check out the Salesforce Known Issues Site.



#### IN THIS SECTION:

#### **HTML** Release Note Filters

Filters help you zero in on the news that matters most. Instead of scrolling through screen after screen, get right to the release notes that affect you. These filters narrow down the list of release notes on the right side of your screen, never the content on the left. If you're more a fan of search than browsing, use these filters to further narrow down your search results.

#### Easily Understand What's in Salesforce Lightning Experience and What's in Salesforce Classic

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

#### Release Notes Changes

Read about updates to the 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.

#### HTML Release Note Filters

Filters help you zero in on the news that matters most. Instead of scrolling through screen after screen, get right to the release notes that affect you. These filters narrow down the list of release notes on the right side of your screen, never the content on the left. If you're more a fan of search than browsing, use these filters to further narrow down your search results.

#### **Edition**

Which feature enhancements are available to you depends on your edition. Narrow down the list of release notes so it shows only enhancements that are available in your edition.

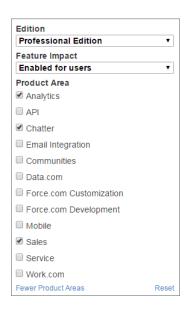
#### **Feature Impact**

Every release includes some features that you turn on or configure before users can start getting the benefits. As an administrator, you can now filter the release notes to focus on, or hide, just those features. Or maybe you want to see only the features that are enabled for your users automatically.

#### **Product Area**

See only the products that your organization uses. If your organization 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.



Once you select filters, you can share your narrowed-down list of release notes with anyone. Copy the URL after you select filters, and then distribute that URL however you want.

## Easily Understand What's in Salesforce Lightning Experience and What's in Salesforce Classic

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

- Communities and *all* its features are currently available in Salesforce Classic *only*, so we tell you that in the Communities "Editions" table. It says "Available in: Salesforce Classic."
- Case Feed, a Service Cloud feature, is available in *both desktop experiences*—Lightning and Classic—so its description says "This feature is available in both Lightning Experience and Salesforce Classic."
- Opportunity Workspace, a new Sales Cloud feature, is available in Lightning Experience *only*, so its description says "This feature is available in Lightning Experience only."

If a *key* feature is also available in Salesforce1, 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 Salesforce1.

## You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered
Lightning Experience	
Make Person Accounts Compatible with Lightning	Person Accounts: Supported in Lightning Experience (Beta)
Need warning when user is about to navigate away from page without saving change.	Edit Inline in Lightning Experience
Formula fields should show on new/edit page	Formula Field Support in Lightning Experience
Reports and Dashboards	
Administrator Access to Personal Report Folders	Query Records Saved in All Users' Private Folders with the allPrivate Query Scope
Delete Reports and Dashboards Belonging to Inactive Users	Manage Everyone's Reports and Dashboards
Service	
Enable validation rules on Knowledge articles	Control Your Data Integrity with Validation Rules on Article Types (Generally Available)
Allow full page layout functionality on Knowledge Articles	Article Type Page Layouts Function More Like Standard Page Layouts (Generally Available)
Asset Hierarchy (Multi Level)	Model Complex Products with Hierarchical Assets
Mobile	
Add support for Standard Object "Asset" in SalesForce1	Salesforce1: Track Purchased Products with Assets (partially delivered)
Chatter	
Ability to Edit a Chatter Post After Posting	Edit Chatter Posts Containing Files or Links
Customization	
Chatter Publisher Action Should Have Option to Not Post to Feed	Select Whether a Quick Action Creates a Feed Item On Execution
Process Builder Change Order Of Criteria Diamonds	Easily Reorder Criteria in Your Process with Drag and Drop

IdeaExchange	Idea delivered
Process Builder: Ability to Rearrange and Add New Steps Between Other Steps	Easily Reorder Criteria in Your Process with Drag and Drop
Process Builder - Default Process Name When Cloning	Reuse Names and Descriptions When Creating a New Process Version
Process Builder: Auto Insert Name When Creating A New Version	Reuse Names and Descriptions When Creating a New Process Version
Process Builder - Allow Hover of Panels and Field Inputs	View Field Names in Your Process at a Glance
Security	
Granting "View Encrypted Data" to Partner and Customer Portal Users	Encrypt Data in Communities
Development	
Automate data manipulation or business logic tasks to make your sandbox environment business ready.	Run Script After Sandbox Creation and Refresh
Allow the setting and modification of the CreatedDate field in unit tests.	Set and Modify the CreatedDate Field in Apex Tests

## 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 Notes Changes**

Read about updates to the release notes.

## April 27, 2016

#### Salesforce Editions Better Optimized to Meet Your Business Needs

We've updated references to Professional, Enterprise, and Unlimited Edition orgs to reflect changes in feature availability that begin May 2016.

#### Turn AppExchange Checkout Data into Insights and Actions

Announced the availability of the Checkout Management App.

#### jQuery No Longer Automatically Included for Custom Lightning Components

Added information about the end of automatic jQuery inclusion.

## April 20, 2016

#### **Changed Apex Interfaces**

Removed the Alert on IP Range Changes example from the TxnSecurity.PolicyCondition interface.

#### **Use an API Client Certificate for Improved Security**

Clarified that the April 19 Windows Update impacts endpoints. Also added that you can use the API Client Certificate with Apex methods PageReference.getContent() and PageReference.getContent().

#### **Encrypt Your Knowledge Articles**

As of Spring '16 you can encrypt files with Platform Encryption and attach them to your Knowledge articles. Only users with the "View Encrypted Data" permission can view these files.

## April 13, 2016

#### SalesforceA for iOS Version 3.1

Learn about the latest release of SalesforceA for iOS.

#### **Use an API Client Certificate for Improved Security**

Announced the ability to use an API client certificate for workflow outbound messages, AJAX proxy, and delegated authentication HTTPS callouts.

#### **Platform Encryption Supports Salesforce for Outlook**

Announced compatibility of Salesforce for Outlook with Platform Encryption.

#### **Platform Encryption Supports Marketing Cloud Connect**

Announced Marketing Cloud Connect compatibility with Platform Encryption.

## March 23, 2016

#### Better Organized Sales Wave Configuration Wizard Now Lets You Control Security Settings

Announced new Sales Wave app configuration wizard question and organization of wizard into four pages.

#### **New Permissions Required to Create Orgs**

Added a note announcing that "Create" and "Read" permissions must now be enabled on the Signup Request object to create orgs from the Environment Hub.

#### Achieve Greatness in the Field with Field Service Lightning (Generally Available)

Announced the availability of Field Service Lightning, a mobile-friendly field service hub that offers smart scheduling, resource allocation, and powerful customization options for field service admins, dispatchers, and technicians.

#### Salesforce1: Create Broadcast Groups

Added admin setup instructions.

#### Salesforce for Outlook and Platform Encryption Play Well Together

Announced the ability to run Salesforce for Outlook for companies that have Platform Encryption enabled.

## March 16, 2016

#### Manage Everyone's Reports and Dashboards

Fixed a query typo.

#### Available Data and UI Elements When Salesforce1 for Android Is Offline

Removed row in Salesforce 1 element table about dashboards due to performance reasons. We're working on resolving these issues.

#### **Enrich Your Community with Images and Videos**

Clarified that only Rich Text components added after Spring '16 support images and videos.

## March 9, 2016

#### **Update ID Fields Using Formulas**

Added a note about updating ID fields, like an Owner ID, using formulas.

#### **Easy Deep Links for Twitter Direct Message Invitations**

Added information on sending deep links for direct message invitations.

#### **Robust Field-level Security for Guest Users**

Clarified that field-level security must be set if guest profiles are enabled in Communities.

#### Import Person Accounts with the Data Import Wizard

Added editions and instructions for using the Data Import Wizard to add person accounts to your org. Also corrected the feature impact table to show this enhancement as enabled for users. Previously, the feature impact table showed this enhancement as enabled for administrators and developers.

#### Add and Update Campaign Members with the Data Import Wizard

Added information about the differences between the Data Import Wizard and the legacy campaign update wizard. Also provided instructions for the various methods of adding and updating campaign members via the Data Import Wizard.

#### **Send Email from Campaign and Case Records**

Clarified that email is only partially supported for case records.

#### **New and Changed Chatter REST API Resources**

Added new resources for accessing the files and social post capabilities for a feed element.

#### Do More with Accounts, Cases, Contacts, and Documents in Employee Communities

Added expanded permissions to standard objects and user permissions for the Company Community user license and Company Community for Force.com permission set license. These permissions are available after March 23, 2016.

### March 2, 2016

#### Creating Datasets With Wave Connector for Excel No Longer Requires Special Admin Setup

Announced release of new version of Wave Connector, available through the Microsoft Apps for Office store.

#### Salesforce for Outlook v3.0.1 Supports Microsoft® .NET Framework 4.5.2

Added details about Microsoft .NET requirements for the latest Salesforce for Outlook version.

#### **Videos**

Added videos about Salesforce Authenticator, Migration Assistant, and Salesforce for Outlook.

#### What's New in the Salesforce1 Downloadable App for Android

Announcing the release of the Salesforce1 downloadable app for Android, version 9.0. In early March 2016, the 9.0 app will gradually roll out to customers over the course of a couple weeks. When it's available for your org, Android users can download the new version from Google Play.

The next version of the Salesforce1 downloadable app for iOS is expected in the Summer '16 timeframe. See Salesforce1: Update on Salesforce1 for iOS Release Plans for more information.

#### Create and Edit Records While Offline Using Salesforce1 for Android (Pilot)

Enhanced offline support, allowing mobile users to create and edit Salesforce records while working offline, is available for Salesforce1 for Android, version 9.0 through a public pilot program. Learn more about this pilot feature, including how to enable it for your org.

#### **Edit Inline in Lightning Experience**

Added a note explaining how Visualforce objects and calculating fields appear on Create, Edit, and Clone pages because of the "SFX Inline Edit" permission. If you haven't configured these objects and fields to work properly on those pages, you can disable the "SFX Inline Edit" permission.

#### **Improved Security for Identity Verification**

Changed the release note title.

### February 24, 2016

#### **Exchange Sync Supports Microsoft® Exchange Server 2016**

Companies running Microsoft Exchange Server 2016 can set up sales reps to sync contacts and events using Exchange Sync.

#### Financial Services Cloud: The Platform for High-Touch Relationship Management (Generally Available)

Announced Financial Services Cloud (Generally Available).

#### Health Cloud: Deliver Collaborative, Connected Patient Care (Generally Available)

Announced Health Cloud (Generally Available).

#### **Lightning Dashboards in Community Management**

Updated the name of the AppExchange package to Salesforce Communities Management.

#### **Debug Lightning Components with the Salesforce Lightning Inspector**

This new Google Chrome DevTools extension enables you to navigate the component tree, inspect component attributes, and profile component performance.

#### **Check Spelling in Your Notes**

Added information about automatic spell-checking in Notes.

#### Chatter Desktop: Retiring in Spring '17

Announced retirement of and the end of support for Chatter Desktop.

#### Chatter Messenger: Retiring in Spring '17

Announced retirement of and the end of support for Chatter Messenger.

#### **Support for Using Outlook for Mac 2016**

Announced support for using Salesforce App for Outlook with Outlook for Mac 2016.

#### **Improved Security for Identity Verification**

Added information about how to reduce the number of times your users are prompted to verify their identity.

## February 17, 2016

#### **App Setup Dashboard Tracks Your Configuration Wizard Selections**

New dashboard added to Sales Wave to record values used in configuration wizard when creating the app.

#### **Encrypt Data in Communities**

Added information: Community role names are displayed differently when Account Name is encrypted.

#### **Lightning Connect**

Added information: Lightning Connect has been renamed to Salesforce Connect. The Salesforce user interface and documentation will be updated to use the new feature name in Summer '16.

#### Activity Reminders and Emails: User Setting Interface Improved in Salesforce Classic

Corrected the description of changes made to labels in Spring '16. The section Events and Tasks was changed to Reminder Settings, not Activity Reminders. The new section is called Email Settings, not Activity Emails.

#### **Videos**

Added a video about Security Health Check.

#### Manage Everyone's Reports and Dashboards

Added the requisite user permission, "Manage All Private Reports and Dashboards."

#### **Role Field on User Search Layout**

Added information about the deleted Role field.

#### **Upgrade Your Transport Layer Security (TLS) Version for HTTPS Connections**

Announced disablement of an outdated encryption protocol, TLS 1.0.

#### **Search Returns Matches for Different Forms of Search Terms**

Added release note.

### February 10, 2016

#### **Updates to the Security Implementation Guide**

Added the Transaction Security feature to the Security Implementation Guide.

#### Get Metrics on How Your Users Search for Files

Added link to walkthrough.

#### **Data Loader**

Added a reminder to install Java and set the JAVA\_HOME environment variable. Also specified the 32-bit version of Java JRE 1.8 for Windows. Added a screenshot of the latest Data Loader version.

#### Salesforce1: Team Up to Close Deals

Added details about opportunity teams in Salesforce1.

#### URL Custom Button and Link Support in Lightning Experience and Salesforce1

Added note about URL custom button behavior in Salesforce1.

## February 3, 2016

#### **Help and Training**

Added Help and Training section.

#### **Verify Your Security Protocol to Avoid Salesforce App for Outlook Service Interruptions**

Added details about how Salesforce App for Outlook users can prepare for TLS 1.0 disablement.

#### Verify Your Security Protocol to Avoid Exchange Sync Service Interruptions

Added details about how Exchange Sync users can prepare for TLS 1.0 disablement.

#### **Upgrade Soon to Avoid Salesforce for Outlook Service Interruptions**

Added details about how Salesforce for Outlook users can prepare for TLS 1.0 disablement.

#### Salesforce1: Update on Salesforce1 for iOS Release Plans

Added a note about the new release plans for the Salesforce1 downloadable app for iOS now that the iOS compatibility issue that blocked the release of version 8.0 is resolved.

#### Allocate More Seats in the License Management App

Added a note announcing an increase to the number of licensed seats that you can allocate per subscriber in the License Management App.

#### **Preview Tab Contents with Tab Hovers**

Added a list of entities on which tab hovers aren't available.

#### **Data Import Wizard Respects More Field Accessibility Settings**

Announced that the field access settings in page layouts and field-level security now affect admin users of the Data Import Wizard.

#### **Salesforce Console API (Integration Toolkit)**

Clarified the behavior of the payload element tabObjectId.

#### **Quickly Get Up to Speed with Dashboard JSON Changes**

Some dashboard JSON property names and values changed to make them easier to understand. When you save your dashboard, Wave updates them in the JSON for you. In addition, you can now apply new properties to widgets.

#### **Changes to Layouts JSON for Dashboards on Mobile Devices**

The layouts JSON, available for formatting dashboards for mobile devices, has a new syntax and other changes in this release.

#### **New Change Set Components**

Removed the note about Wave Application and Wave Dataset pilot components, and removed those types from the **New Metadata API Types** note.

## January 27, 2016

#### **New Events Prefilled with Date and Time**

Specified that the user interface for creating an event in Salesforce1 or in the activity timeline in Lightning Experience has been improved. The start time is now prefilled with the next full hour, and the end time is one hour later.

#### **Username Added to Identity Verification Email Message**

Added a note announcing that the username is now shown in the identity verification email that users get when they try to log in from an unrecognized device.

### January 20, 2016

#### Pipe Activity and Account Summary Dashboards Added to Sales Wave App

Two new dashboards added to Sales Wave to expand exploration capabilities.

#### **Enhanced Security with the Force.com Migration Tool**

TLS 1.2 support and discontinued support of TLS 1.0.

#### **Added Support for Custom Picklist Fields (Beta)**

Added information on support for custom picklist fields in your custom metadata types for different organizations.

#### **New Apex Interfaces**

Added a note about the new getUserInfo method in the AuthProviderPlugin interface.

#### Replay PushTopic Streaming Events (Beta)

Added link to a sample for Durable PushTopic Streaming (Beta).

#### Do More with Accounts, Cases, Contacts, and Documents in Employee Communities

New release note to explain updates made to the Employee Community license.

#### Analyze Event Monitoring Data with the Admin Analytics App (Pilot)

The Admin Analytics app is available to select customers through a pilot program, rather than Generally Available.

## January 16, 2016

#### **Automatically Get Geocodes for Addresses**

Removed the release note announcing this feature. Automatic geocodes is a closed beta feature. For information on joining this beta program, contact Salesforce.

## January 13, 2016

#### **Customize Tabs in the Record Information Tabs Component**

Rearrange and hide tabs in the Record Information Tabs component.

#### Change in How the Recent Items Component's entityNames Values Are Listed

Added information on this change to how Lightning component attributes that are complex values are handled.

#### **Access Encrypted Data With Heroku Connect**

Heroku Connect supports Platform Encryption.

#### **Detect Field Encryption with SObject**

Get a field's encryption status with the Ajax Toolkit.

#### **Customize Tabs in the Record Information Tabs Component**

Rearrange and hide tabs in the Record Information Tabs component.

#### SalesforceA for Android Version 3.0

Learn about the latest release of SalesforceA for Android.

#### Increased Dashboard Refresh Limit for Role-Based External Users

All role-based external users in your community can now refresh dashboards up to 1,000 times daily per org.

#### Mail Merge: End of Support

Added link to Salesforce disabling TLS 1.0 article, which gives the most up-to-date timeline on the disablement schedule.

#### **Connect for Office: End of Support**

Added link to Salesforce disabling TLS 1.0 article, which gives the most up-to-date timeline on the disablement schedule.

#### Salesforce for Outlook Retiring Support for Microsoft® Windows Vista®

Added link to Salesforce disabling TLS 1.0 article, which gives the most up-to-date timeline on the disablement schedule.

#### **Pardot: Make Lead and Contact Syncing Smarter**

Added Pardot release notes.

### January 6, 2016

#### You Asked for It!

Added Ideas that we delivered.

#### **Napili Now Supports Even More Objects**

Added the complete list of objects Napili now supports.

#### See Your Community's Organized Content in the Topic Catalog

Added an important note regarding changing the template (rather than simply updating it) to take advantage of this feature. Added two See Also links to Help topics with more information regarding changing templates.

#### Custom List View Buttons No Longer Available in the Enhanced Page Layout Editor

Added an explanation of the change and why it was needed.

#### **Set and Modify the CreatedDate Field in Apex Tests**

Added a note about the new System. Test. setCreatedDate method, which was previously mentioned only in Changed Apex Classes.

#### **New Objects**

Added the NavigationMenuItemLocalization object.

#### **Changed Objects**

A change to the AuraDefinition object was added. The TOKENS value was added to the picklist for the DefType field.

Two new fields, BannerPhotoUrl and IsProfilePhotoActive, were added to the User object.

#### **Metadata API Types**

A change to the AuraDefinitionBundle type was added. The enumeration for the type field now includes the value Tokens.

#### Don't Ignore Browser Console Warnings for Access Check Violations!

If you access a Lightning component or attribute that doesn't have an access system attribute allowing you to access it, you see a warning in your browser console in Spring '16. Don't ignore the warnings or your code will break when Summer '16 rolls out.

#### Leads: Update Details for Converted Leads in Salesforce Classic

Added details about a new option for letting sales teams edit converted leads.

#### Marketing

Added links to September and October Marketing release notes

#### Make Calls to PageReference.getContent() After DML and Savepoints

Added a note about improved flexibility for using getContent () within asynchronous Apex.

#### **Lightning Components**

Provided usage notes for beta component forceChatter:fullFeed.

#### Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud

Removed details about preparing for TLS 1.0 disablement until customer attention is required.

#### **Exchange Sync: Sync Microsoft® Contacts and Events Without Software (Beta)**

Removed details about preparing for TLS 1.0 disablement until customer attention is required.

#### Salesforce for Outlook: Integrate Microsoft® Outlook® and Salesforce

Removed details about preparing for TLS 1.0 disablement until customer attention is required.

#### Improved Bandwidth and Time Limit Enforcement for Force.com Sites

Added enhancements to Force.com Sites Bandwidth and Time Limit Enforcement.

#### **Customize the Navigation Experience for Lightning Experience Users**

Added description of the new Lightning Experience feature for customizing navigation menus.

#### **Edit Inline in Lightning Experience**

Added description of the new Lightning Experience feature for inline editing.

#### Improved Auth. Provider Client Configuration URLs

Removed the note about improved authentication provider client configuration URLs. This feature isn't currently available.

#### Improved Auth. Provider Client Configuration URLs for Communities

Removed the note about improved authentication provider client configuration URLs for communities. This feature isn't currently available.

## December 23, 2015

#### Sales Features: What's Not in Lightning Experience

Added a few more limitations for Campaigns support in Lightning Experience.

#### Navigation and Actions: What's Not in Lightning Experience

Added a list of the Salesforce objects are that supported in custom Lightning Experience navigation menus.

#### More Objects Searchable in Lighting Experience

Added campaigns to the list of searchable objects.

## Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience

Significantly revised this topic.

#### **Improved Security for High-Assurance Resource Access Using APIs**

Removed Metadata API from the list of APIs that can't access high-assurance resources from a standard session.

#### **Other Resources**

Added a link to the Release Readiness & Feature Adoption community.

#### Notes: Compose from Any Lightning Page and Let Reps Restore Previous Versions

Removed references to colored text and highlighting in 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—whether it's in the Salesforce Help, release notes, or developer guides at Salesforce Developers—look for the feedback form and vote up or down. Add comments if you have them.
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### How and When Do Features Become Available?

Some features in Spring '16 affect all users immediately after the release goes live. You may want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

## Lightning Experience: A New, Modern, Intelligent User Experience

It's here ... the new Salesforce 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. Learn about the benefits of this intuitive, efficient interface. Then decide when it's time to make the switch—the power is in your hands. (If you used person accounts in your production org before now, Lightning Experience is available within 24 hours after the Spring '16 release. Otherwise there's no wait.)

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Is Lightning Experience Right for Your Salesforce Org?			~	
Transition to Lightning Experience: Let's Do This!			~	
Lightning Experience Considerations			~	

# Financial Services Cloud: The Platform for High-Touch Relationship Management (Generally Available)

Today's digitally connected investors expect personalized outreach, proactive insights, and goals-based advice from their financial advisors. Salesforce Financial Services Cloud delivers the technology to accelerate your advisors' productivity, helping them engage with clients like never before and build deeper, lasting, more profitable relationships.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Take Charge of the Day with the Home Page				~
Engage More Deeply Than Ever with Your Book of Business				~
Comprehensive Client and Household Profiles				~
Know Where You Stand with Dashboards				~
Platform Built on the Industries B2C Data Model				~
APIs for Integration				~

# Health Cloud: Deliver Collaborative, Connected Patient Care (Generally Available)

Delivering outstanding patient care means more than simply managing the information and events that involve patients. Health Cloud reinvents the way that care coordinators engage with patients.

Enabled for users	administrators/ developers	administrator setup	Contact Salesforce to enable
			~
•			~
I			~
			~
1			~
			~
		Enabled for users administrators/developers	Enabled for users developers setup

## Sales: Opportunities, Campaigns, and More

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activities that need their attention. And help your sales teams increase their sales productivity in Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Core Sales	Features: Help Reps S	iell Using Lightning l	Experience	
Accounts: Store Information About the	People and Business	You Work with in Lig	htning Experience	
Person Accounts: Supported in Lightning Experience (Beta)			~	
Account Insights: Better Display and Navigation in Lightning Experience	~			
Account Insights: Improve the Relevancy of News in Lightning Experience	~			
Forecasts: Use Collaborative Forecasts with Custom Fiscal Years			~	
Campaigns: Drum Up New and Repeat	Business in Lightning	Experience (Beta)		
Create Initiatives to Complement Sales Efforts			~	
Add Members to Marketing Campaigns in One Fell Swoop			~	
Track Campaign Member Status			~	
See Campaign Membership for Leads, Contacts, and Person Accounts			~	
See a Campaign's Effect on Deals in the Pipeline			~	
Opportunities: Track and Manage Your	Deals in Lightning Exp	perience		
Opportunity Board Is Now Opportunity Kanban	~			
Team Up to Close Deals in Lightning Experience			~	
Productivity Fea	tures: Help Sales Reps	s Do More with Light	ning Experience	
List Views: Find Data Faster in Lightning	g Experience			
Filter and Customize to Get Data Faster in Lightning Experience (Generally Available)	~			
Resize Columns in Lightning Experience	~			
Home: Keep Tabs on Your Meeting Schedule and Task List			~	
Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Log Calls from Anywhere in Lightning Experience				
Email: Be More Productive with a Pop-C	Out Composer Windov	v, Updatable Templa	ates, and More in Lig	Jhtning Experience
Write Email and Create Templates More Efficiently From the Composer Window	~			
Update and Maintain Email Templates More Easily	<b>~</b>			
Send Email from Campaign and Case Records	<b>~</b>			
Activities: Keep Up with the Speed of B	usiness in Lightning E	xperience		
Activities Global Actions: Create Activities on the Spot, When You Want	~			
Activity Timeline: Zero In on the Activities You Want to See	~			
Calendar: Create a Meeting by Clicking a Time Slot	<b>~</b>			
Opportunity Calendar: Stay on Top of Opportunities (Beta)	<b>v</b>			
Task List: Let Overdue Tasks Wait	~			
Other Changes in Activities	~			
Notes: Compose from Any Lightning Pa	ige and Let Reps Resto	ore Previous Version	S	
Easily Create a Note from Any Page			<b>✓</b>	
View and Restore Previous Versions of Notes	~			
Include Images in Notes	~			
Filter the Notes List View	~			
Notes No Longer Requires Chatter			~	
Check Spelling in Your Notes	~			
Microsoft® Integration:	Sync and Work Betwe	een Microsoft Email	Systems and Salesfo	orce
Salesforce App for Outlook: Integrate M	Nicrosoft and Salesfor	ce in the Cloud		
Support for Using Outlook for Mac 2016	~			
Create Salesforce Records Directly in Microsoft Email Applications			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Relate Emails to Salesforce with Microsoft® Exchange 2013 On-Premises	<b>~</b>			
My Domain Now Supported for Salesforce App for Outlook	~			
Forget the Name Email Connect	~			
Verify Your Security Protocol to Avoid Service Interruptions			<b>~</b>	
Exchange Sync: Sync Microsoft® Contac	ts and Events Withou	t Software (Beta)		
Sync Sales Reps' Private Events			<b>✓</b>	
Exchange Sync Supports Microsoft® Exchange Server 2016			~	
Test Your Connection Between Salesforce and Microsoft® Exchange		~		
Verify Your Security Protocol to Avoid Service Interruptions			~	
Salesforce for Outlook: Integrate Micros	soft <sup>®</sup> Outlook <sup>®</sup> and Sa	lesforce		
Salesforce for Outlook and Platform Encryption Play Well Together			~	
Salesforce for Outlook v3.0.1 Supports Microsoft® .NET Framework 4.5.2			~	
Upgrade Soon to Avoid Service Interruptions			~	
Par	dot: Make Lead and C	Contact Syncing Sma	rter	
Salesforce Connector: Sync Most Recently Updated Record			~	
Salesforce Connector: Merge and Delete Prospects Automatically			~	
Data Compliance: Specify Cookie Durations			~	
Lists: View and Share Segmentation Rule and Dynamic List Previews	<b>✓</b>			
Reporting: View Visitor Graphs	~			
Engage for Gmail: Access Prospect Details in Gmail	<u>~</u>			
	Other Changes in	the Sales Cloud		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Easily Find Merge Fields for Templates and Emails	✓			
Get Copies of Email You Send	~			
Get Mass Email Opt-Out and Bounce Indicators Before You Send	<b>✓</b>			
Unresolved Items: Available in Lightning Experience	<b>~</b>			
Leads: Update Details for Converted Leads in Salesforce Classic			<b>✓</b>	
Permission Required to Edit Contract Settings		~		
Data Import Wizard: Import Data from Some Object Home Pages	<b>✓</b>			

## **Analytics**

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and	Dashboards: Analyze	Your Data in Lightni	ng Experience	
Show Details in Matrix Reports in Lightning Experience	~			
Filter Dashboards in Lightning Experience	~			
View Dynamic Dashboards as Other Users in Lightning Experience	<b>~</b>			
View Tables on Dashboards in Lightning Experience	<b>~</b>			
Improvements to the Reports and Dashboards Home Pages in Lightning Experience	✓			
More Options for Charts in Lightning Experience	<b>~</b>			
Manage Everyone's Reports and Dashboards		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Wave	Analytics: Take Data	Analysis to the Next	Level	
Integrate Data				
Enrich Your Datasets with Derived Fields	~			
Create Multiple Dataflows with Replication (Pilot)				~
Creating Datasets With Wave Connector for Excel No Longer Requires Special Admin Setup	<b>✓</b>			
Sales Wave Analytics App				
Better Organized Sales Wave Configuration Wizard Now Lets You Control Security Settings	<b>✓</b>			
Pipe Activity and Account Summary Dashboards Added to Sales Wave App	~			
App Setup Dashboard Tracks Your Configuration Wizard Selections	~			
Explore, Visualize, and Design				
Quickly Build Responsive Grid-Based Dashboards with Flex Dashboard Designer (Beta)			~	
Customize Lenses and Dashboards More Easily with Integrated Tools		~		
Make Your Dashboards More Interactive with Auto-Faceted SAQL Query Lenses		~		
Take Out the Guesswork When Designing a Dashboard Layout	~			
Quickly Get Up to Speed with Dashboard JSON Changes	~			
Expand Your Visualization Capabilities with New Chart Types	~			
Additional Interface Changes to Improve the Wave Experience	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Securely Share Wave Analytics with Community Partners and Customers (Generally Available)			<b>~</b>	
Custom Action Menus Broaden Support for Standard Salesforce Actions				~
Experience Wave Mobile with the Latest iOS Features	~			
Develop with the Wave REST API				
Wave REST API Moves into the Limelight				~
Enhance Your Wave Application with New API Endpoints				~
Build Powerful Queries Using SAQL				
Drill Down into Your Data with New Windowing Functions				~
Aggregate Better Than Average				~
Exponentially Better Math Functions				~

# Service: Hello Field Service for Agents, Goodbye Routine Setup Tasks for Admins

Extend your support team's service out into the field with work orders. Set up knowledge faster with an automatically created article type and standard page layouts, and set up social service without contacting Salesforce or searching for settings.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customer Service Tools in Lightning Experience				
	Field S	ervice		
Go Forth, Field Technicians: Introducing			~	
Work Orders (Generally Available)				
Achieve Greatness in the Field with Field			~	
Service Lightning (Generally Available)				
	Ass	ets		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Model Complex Products with Hierarchical Assets			~	
Other Changes in Assets	~			
	Knowl	edge		
Control Your Data Integrity with Validation Rules on Article Types (Generally Available)		<b>✓</b>		
Article Type Page Layouts Function More Like Standard Page Layouts (Generally Available)		₹.		
Other Changes in Knowledge	~			
	Console fo	or Service		
Improve Performance by Limiting the Number of Open Tabs			~	
Preview Tab Contents with Tab Hovers			~	
Encourage Best Practices by Preventing Agents from Closing Tabs			~	
Reminder: We Don't Support IE 8 Anymore	<b>~</b>			
	Case I	Feed		
Added Features Improve Viewing Emails in Lightning Experience	<u>~</u>			
Agents Can Use and Create Email Templates in Lightning Experience	<b>~</b>			
Create Cases from the REST API				~
	Live A	gent		
Enhanced Chat Transfer				
Transfer Chats to a Chat Button or Queue			~	
Choose Transfer Options for Your Agents			~	
Keep Support Agents in Sync with Chat Transfer and Conference Messages			~	
	Omni-C	hannel		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automatically Re-Route Waiting Requests with Push Time-Out				
	SO	)S		
Provide Better Support by Accessing Your Customer's Cameras During an SOS Session (Beta)		<u>~</u>		
Improve the Customer Support Experience in Your App Using the SOS Agent Availability API		<b>✓</b>		
	Social Custon	mer Service		
Know which Social Studio Account You're Using without Leaving Salesforce (Generally Available)		<u>~</u>		
Moderate Social Posts Easier and Faster (Generally Available)			~	
Other Changes in Social Customer Service (Generally Available)		~		
	Web-to	o-Case		
reCAPTCHA Lets You Validate That Cases Are Submitted by People, Not Spammers	~			
	Mac	ros		
Run Macros on Any Object with a Feed-Based Layout and Increase Agent Productivity	<u>~</u>			
Run Macros Programmatically Using the API		~		
	Organizat	tion Sync		
Suspending a Connection Hides Published and Subscribed Objects Related Lists			~	
Bulk Sync a Specific Number of Entities to Save Time			~	
New In Progress Connection Status for More Clarity			<u>~</u>	

## Mobile: Do More On the Go

Office? Who needs an office? It keeps getting easier to do what needs doing, from anywhere your sales reps and service agents find themselves. The Salesforce1 mobile app is smarter these days with the enhanced, interactive charts from Lightning Experience, plus new support for objects that keep track of products purchased from you and work orders performed for your customers. And everyone benefits from the reimagined, easy-to-use Salesforce Authenticator mobile app. Our new two-factor authentication app gives your org the strong protection it needs without requiring your users to jump through inconvenient and time-wasting hoops.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1: Boost Mobile	Productivity With Enl	nanced Charts, Servic	e Cloud Objects, an	d More
Salesforce1 Enhancements in This Rele	ase			
Salesforce1: TLS 1.1/1.2 Support for Salesforce1 for Android			~	
Salesforce1: Spell Check for Search Results	~			
Salesforce1: Get More Relevant Search Results with Synonym Groups			~	
Salesforce1: Get More Account Insights (Tablets Only)	<b>~</b>			
Salesforce1: Team Up to Close Deals			~	
Salesforce1: Streamline Field Service with Work Orders (Generally Available)			~	
Salesforce1: Track Purchased Products with Assets			<b>✓</b>	
Salesforce1: See Enhanced Charts (Phones Only)			~	
Salesforce1: More Relevant Mention Suggestions	~			
Salesforce1: Create Broadcast Groups			~	
Salesforce1: Access and Share External Microsoft and Google Files			~	
Salesforce1: Edit Microsoft Office 365 Files			~	
Salesforce1: How to Begin Implementing Enhanced Security for Salesforce1 for Android with MDM			~	
Salesforce1: Create and Edit Records While Offline Using Salesforce1 for Android (Pilot)			~	
Salesforce1: New Color Palette for Salesforce1 for Android	<b>▽</b>			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1 Differences from the Full Salesforce Site			~	
Salesforce 1 App Development Overview		<b>▽</b>		
Salesforce Authenticator Mobile App, Version 2.0, for Two-Factor Authentication	<b>✓</b>			
	Salesf	orceA		
SalesforceA for iOS Version 3.1				
SalesforceA for Android Version 3.0				

# Communities: Chatter in Communities, Template Improvements, Enhanced Moderation, and Much More

Spring '16 is packed with changes that make templates even more customizable. You can show more Salesforce data with custom object pages, create records using global actions, and manage your community's pages more easily. Plus, you can now add full Chatter capabilities to your community with Chatter Lightning components. These features are available in Salesforce Classic only. Other than in Setup, Communities is not supported in Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Why You Must Upgrade Your Community Templates in Spring '16			~	
We've Renamed Some Template Components		~		
	Chatter in Comm	unity Templates		
Add Groups to Drive Collaboration in Your Napili Community			~	
New User Profile Component			~	
Show Users' Related Lists on Profiles			~	
Mix-and-Match Feed Components to Meet Your Community's Needs		~		
Rich Text Editing and Link Previews in the Publisher		~		
	Files in Co	mmunities		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning File Preview Player Now Available in Communities	~			
Attach Multiple Files to a Single Post	~			
Unified File Selection in Communities	~			
	Community	Templates		
Extended Records Functionality in Napi	li			
Allow Community Members to Create Records		~		
Community Members Can Access More Actions on Records		~		
New-and-Improved Record List Component			~	
Customize Tabs in the Record Information Tabs Component			~	
Display Record Details Where You Need Them Most			~	
Show Related Record Data on Community Pages		~		
Napili Now Supports Even More Objects		~		
Lookup Fields on Records			<b>✓</b>	
Improved Navigation for Community Users		~		
Topics, Subtopics, and the Topic Catalog	g			
Set Up Subtopics to Structure Napili Community Navigation		~		
See Your Community's Organized Content in the Topic Catalog		~		
Help Members Discover Content with Topic Recommendations	~			
Quickly Search Articles and Apply Topics in Your Community		~		
Extensible Aloha Template with Lightning Components			~	
Enhanced Leaderboard Drives More Engagement			<b>~</b>	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Endorse Knowledgeable Members from a Community User Profile Page		~		
Enrich Your Community with Images and Videos		~	~	
Easy Account Access for External Users			~	
Easily Change Email and Password in the Community	~			
	Communi	ty Builder		
Manage Pages More Easily with the Enhanced Page Manager		~	~	
Make the Most of Your Data with Improved Page Creation		~	~	
Change Things Up with New and Custom Layouts			~	
Access Community Builder Directly from Setup		~		
Add Markup to the Page <head> to Customize Your Community</head>		~	~	
Improved Error Handling for Lightning Components		~	~	
<b>Enhanced Page Loading Experience</b>		~		
Hide or Customize the Default Koa and Kokua Header			~	
jQuery No Longer Automatically Included for Custom Lightning Components		✓		
	Commun	ity Setup		
Communities Setup is Now Available in Lightning Experience		~		
Maximum Number of Communities Is Now 50		~		
Streamlined Setup of Two-Factor Authentication for Communities			~	
Let Users See Encrypted Data		~		
	Community N	Management		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Limit the Size and Types of Files Allowed in Your Community			~	
Increased Community Moderation Limits		~		
Extended Moderation Support for All Feed Types		~		
Display Blocked Keywords in Your User Messages for Moderation Rules		~		
Translate Your User Messages for Moderation Rules			~	
Keyword Lists Now Support Special Characters and Spaces		~		
Use the API to Set Up Moderation Rules		~		
Target Community Member Audiences for Your Recommendations			~	
Control Where Your Recommendations Appear			~	
	Community Report	ts and Dashboards		
Report Management for All Role-Based External Users			~	
Increased Dashboard Refresh Limit for Role-Based External Users	<b>✓</b>			
New Custom Report Types and Fields for Moderation, Recommendations, and User Profile		✓		
Share Wave Analytics with Your Community (Generally Available)		~		
	Community Insig	hts and Analytics		
Lightning Dashboards in Community Management			✓	
New and Improved Insights and Dashboard for Community Management		~		
	Other Changes i	n Communities		
Edit Posts Containing Files or Links	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increased User Limit for Customer Communities		~		
Customer Community Licenses Can Access Notes and Attachments on Accounts and Contacts				<b>✓</b>
Get Emails on Every Post in Large Community Groups	~			
Do More with Accounts, Cases, Contacts, and Documents in Employee Communities	✓			
Robust Field-level Security for Guest Users			~	

## Chatter: Broadcast Groups, Banner Photos, Edit More Posts

Create broadcast groups, enjoy banner photos for users and groups, and edit posts with files and links. There are more improvements for groups, user profiles, feeds, and personal digest emails.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Grou	ups		
Keep Discussions Focused with Broadcast Groups—Generally Available	~			
Add Fun and Color to Groups with Banner Images	~			
Lightning Experience Now Supports Customer Groups	~			
Monitor Group Member Activity in Group Report	~			
More Groups, More Collaboration	~			
Napili Communities Now Support Groups	~			
Allow Record Creation in Groups for Custom Objects Not Allowed in Groups			~	
Send Email Notifications for Group Announcements (Beta)				<b>✓</b>

Feature	Enabled for users	Enabled for administrators/	Requires administrator	Contact Salesforce to enable
rediure	User P	developers	setup	enable
	User Pi	rotties		
Jazz up User Profiles with a Banner Photo (available within 24 hours after the release)	<b>~</b>			
Improved Photo Upload and Editing Experience	<u>~</u>			
Circular Photo Preview	<b>✓</b>			
Profile Photos on the People Page	<b>✓</b>			
More Chatter Users Can Access Lightning Experience	<b>▽</b>			
Role Field on User Search Layout	~			
	Fee	eds		
Edit Chatter Posts Containing Files or Links	<b>✓</b>			
More Relevant @Mention Suggestions	~			
Refresh the Chatter Feed Lightning-Fast in Lightning Experience	<b>▽</b>			
	Digest	Emails		
Personal Digest Emails: Redesigned and Better Coordinated with Group Digests (Generally Available)				
Chatter Messenger: Retiring in Spring '17	<b>~</b>			
Chatter Desktop: Retiring in Spring '17	<b>✓</b>			
Chatter Desktop: Version 3.2.3 Released	<b>✓</b>			
Files				

## Files: Share Files in Lightning, Use Files Without Chatter, and More

Files now works whether Chatter is on or off. Share files with people and groups in Lightning Experience. Manage access to files in new ways. Navigate your libraries in Files Home, and your Files Connect external sources when selecting files to post in Lightning. Devour this section to learn about all these juicy new features and more!

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Files Without Chatter	<b>✓</b>			
Share Files with People and Groups in Lightning Experience	<b>▽</b>			
Preview Files Connect External Google Docs in Lightning Experience	<b>✓</b>			
Browse Files Connect External Sources When Selecting Files in Lightning Experience	<u>~</u>			
Open Files from SharePoint Online and OneDrive for Business With One Click	<b>~</b>			
Files Connect for Box (Pilot)				~
Navigate Libraries in Files Home in Lightning Experience	<b>~</b>			
View Multi-File Community Record Feed Posts in Lightning Experience	<b>~</b>			
Upload Files to Notes & Attachments List in Salesforce Classic			~	
New "Set by Record" Access for Shared Files	~			
Files Sync Supports OSX El Capitan	~			

## **Search: Finding Information**

Help your users quickly find the information they need. Some Spring '16 search changes will be immediately noticed (and appreciated) by users, such as search term spell correction. In Lightning Experience, we're introducing search results sorting, enhanced formatting for instant results, expanded lineup of searchable objects, and a new button for custom objects and records inside lookups. Behind the scenes but still enhancing the search experience is expanded scope for synonym groups.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Synonym Groups Enabled for More		~		
<b>Objects and Maximum Limit Increased</b>				
(available within 24 hours after the release)				
Spell Correction Expanded to More	~			
Objects (available within 24 hours after				
the release)				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search Returns Matches for Different Forms of Search Terms		~		
Get Metrics on How Your Users Search for Files		~		
Find a Record Faster with Search Results Sorting	~			
Instant Results Look Even Better	~			
More Objects Searchable in Lighting Experience	<u>~</u>			
Create a Custom Object Item from Within a Lookup	~			

# Data.com: Prospecting in Lightning Experience, Critical Company Info for Leads, and More

Several key Data.com Prospector features are now available in Lightning Experience, including Company Hierarchy, Prospecting Insights, and the ability to discover contacts for accounts. Also in this release, Data.com Premium Clean customers can now automatically enrich leads with valuable company details.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Data.com F	Prospector		
Find the Right Contacts to Close Deals in Lightning Experience			~	
Get a Complete Business Picture for Accounts in Lightning Experience			~	
See Company Hierarchy in Lightning Experience to Quickly Identify New Prospects			~	
	Data.com	n Clean		
Automatically Enrich Leads with Critical Company Information (Beta)			~	
Retirement of Data.com Social Key			~	

# Customization: Easier Setup, Object Management and Flows, and Much More

We've got some key Lightning Experience enhancements—the ability to update your users' navigation menus and more resources dedicated to helping you migrate. Picklists are getting better and better with new restricted picklists and improved global picklists. And for you Process Builder mavens, a new drag-and-drop interaction makes reordering the contents of your process easy as 1-2-3.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
General Administration					
Customize the Navigation Experience for	or Lightning Experien	ice Users			
Create Lightning Experience Navigation Menus			~		
Considerations for Custom Navigation Menus			~		
URL Custom Button and Link Support in Lightning Experience and Salesforce1		~			
Select Whether a Quick Action Creates a Feed Item On Execution		~			
Create Custom Success Messages for Quick Actions		~			
Custom List View Buttons No Longer Available in the Enhanced Page Layout Editor		<u>~</u>			
Delegate Admin Privileges to Select Users from Setup in Lightning Experience		<u>~</u>			
Eliminate Picklist Clutter with Restricted Picklists (Beta)		~			
Test-Drive Global Picklists More Easily (Pilot)			<u>~</u>		
Translate Global Picklists in Multiple Languages (Pilot)			<b>~</b>		
End of Support for JavaScript, iFrames, CSS, and Other Advanced Markup in Standard Messages & Alerts Home Page Components		~			
Formula Field Support in Lightning Experience	<u>~</u>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improved Bandwidth and Time Limit Enforcement for Force.com Sites		~		
Migrate to Lightning Experience like a Boss			~	
	Lightning Expo	erience Setup		
Setup: Right-Click to View in a New Tab or Window in Lightning Experience		~		
	Lightning A	pp Builder		
Deletion of Custom Lightning Experience Record Pages (Pilot)		~		
Create Custom Tab Sets on Record Pages in Lightning Experience (Pilot)		~		
Create Custom Lightning Experience Record Pages from Scratch in the Lightning App Builder (Pilot)		✓		
Auto-Suggestion of Results in Lightning App Builder Drop-Down Menus		~		
Change in How the Recent Items Component's entityNames Values Are Listed		✓		
	Data Custo	omization		
Data Import Wizard Enhancements				
Import Person Accounts with the Data Import Wizard	~			
Accessing the Data Import Wizard		~		
Data Import Wizard Import Status		~		
Add and Update Campaign Members with the Data Import Wizard	~			
User Permission for Importing Custom Objects		~		
Data Import Wizard Respects More Field Accessibility Settings		~		
Data Loader		~		
	Lightning	Connect		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
Enable Writable External Objects with External Systems That Require CSRF Protection			~		
Access Encrypted Data Via Lightning Connect			~		
	Process	Builder			
Easily Reorder Criteria in Your Process with Drag and Drop		~			
Reuse Names and Descriptions When Creating a New Process Version		~			
View Field Names in Your Process at a Glance		~			
Easier Mentions in Post to Chatter Actions		~			
Update ID Fields Using Formulas		~			
Send Email Alerts for Tasks and Events		~			
	Shai	ring			
Optimized Parallel Sharing Rule Recalculation		~			
Monitoring Monitoring					
Prevent Identity Fraud with Login Forensics (Generally Available)		~			
Analyze Event Monitoring Data with the Admin Analytics App (Pilot)			~		

# Security and Identity: Better Authentication, Flexible Transaction Policies, More Encryption Coverage

We've improved two-factor authentication and added verification history. You can create your own authentication provider plugin. Your transaction policies can now use external web services, so you don't have to write a lot of policy-specific code. And Platform Encryption is now available to protect data in Communities.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
Authentication and Identity					

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identity Verification Method Added for Two-Factor Authentication	~			
Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users			~	
New Profile Policy for Session Security Level at Login		~		
Session Timeout Name Changed in Profile Settings		~		
Control Session Security Level for Device Activation		~		
Track User Identity Verifications		~		
Implement Identity Verification in Your Custom Solution with Apex		~		
Improved Security for Identity Verification	~			
Improved Security for High-Assurance Resource Access Using APIs		~		
New Special Character Assistance When Changing Passwords	<b>~</b>			
New Time Values for Connected App Mobile App Settings		~		
External Identity Users Can Work with Accounts, Person Accounts, Assets, and Contacts			~	
Create a Custom Authentication Provider Plug-in with Apex		~		
Username Added to Identity Verification Email Message	<b>~</b>			
	Platform E	ncryption		
Encrypt Data in Communities		~		
Encrypt Email Attachments			~	
Key Management Permission Not Granted by Default			~	
Encrypted Fields Are PCI-DSS-Compliant	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Encrypted Data Via Lightning Connect		-	<u>✓</u>	
Encrypt More Account and Contact Fields			~	
Don't Encrypt Data With Email Plugins		~		
Access Encrypted Data With Heroku Connect			~	
Detect Field Encryption with SObject			~	
Platform Encryption Supports Salesforce for Outlook			~	
Platform Encryption Supports Marketing Cloud Connect			~	
Encrypt Your Knowledge Articles			~	
Transaction Security Policies Address Security Issues		~		
	Platform	Security		
View and Address Security Risks Using Health Check		~		
Default Certificate is 2048 Bits			~	
Upgrade Your Transport Layer Security (TLS) Version for HTTPS Connections			~	
Use an API Client Certificate for Improved Security		~		

# **Deployment**

You now have new ways to deploy changes to your Salesforce org. Deployment changes include test options for change sets. Sandbox enhancements include a new sandbox copy engine and increased Developer Sandbox licenses.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improved Deployment Experience During Service Updates		~		
Enhanced Security with the Force.com Migration Tool		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Sandbox Enl	hancements		
Improved Sandbox Copy Engine for Partial and Full Copies with Templates Sandboxes (Generally Available)		<b>V</b>		
Increased Developer Sandbox Licenses		~		
Run Script After Sandbox Creation and Refresh		~		

# Development: Create Your Own Salesforce App

Force.com helps you develop new applications and integrations to help your organization or for resale to other organizations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Custom Met	adata Types	•	
Bulk Create Custom Metadata Records			~	
Added Support for Custom Picklist Fields (Beta)			<b>~</b>	
Upsert Custom Metadata Records			<b>✓</b>	
	Visual	lforce		
Visualforce for Lightning Experience (Beta)		~		
Add Visualforce Pages to the Lightning Experience Navigation Menu			<b>~</b>	
Use User.UITheme and UserInfo.getUiTheme() to Determine User Experience Context		~		
"Serve Static Resources from the Visualforce Domain" Critical Update Postponed			<u>~</u>	
"PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed			<u>~</u>	
	Apex	Code		
Create More Robust Apex Tests and Mo	re Flexible Test Runs			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Test Suites of Commonly Used Apex Test Classes		~		
Stop a Test Run That's Failing Miserably		~		
Set and Modify the CreatedDate Field in Apex Tests		~		
Call Test.startTest() to Reliably Reset Limits in Apex Tests		~		
Use @future to Avoid the Dreaded MIXED_DML_OPERATION Error in Apex Tests		✓		
Compare Currency to Decimals in Apex Tests		~		
Test WSDL-Based Asynchronous Callouts		~		
Locate Jobs in the Apex Flex Queue		~		
Test Performance Gains with Platform Cache Trials		~		
Purchase Platform Cache		~		
Make Calls to PageReference.getContent() After DML and Savepoints		✓		
Find the Renamed Apex Developer Guide More Easily		~		
New and Changed Apex Classes, Enume	erations, Exceptions, a	and Interfaces		
New Apex Classes		~		
Changed Apex Classes		~		
New Apex Enums		~		
New Apex Exception		~		
New Apex Interfaces		~		
Changed Apex Interfaces		~		
ConnectApi (Chatter in Apex)				
New and Changed Chatter in Apex Classes		~		
New and Changed Chatter in Apex Input Classes		<b>▽</b>		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Chatter in Apex Output Classes		~		
New and Changed Chatter in Apex Enums		~		
	Lightning Co	omponents		
Run Lightning Components Apps Anywhere with Lightning Out (Beta)		<b>▽</b>		
Capture Design Variables with Lightning Components Tokens (Developer Preview)		✓		
Don't Ignore Browser Console Warnings for Access Check Violations!		~		
Debug Lightning Components with the Salesforce Lightning Inspector		✓		
Dynamically Populate Label Parameters with format()		✓		
Improved Performance with Secure Client-Side Caching		✓		
\$A.error() Is Deprecated		~		
Sfdc JavaScript Global Is Removed		~		
Resolved Errors with Apex Controllers with List or Map Parameters		<b>▽</b>		
Lightning Components		~		
	AF	PI		
Retirement of Endpoint Routing for API Logins		~		
New, Changed, and Retired Objects				
New Objects		~		
Changed Objects		~		
Retired Objects		~		
SOQL				
Query Records Saved in All Users' Private Folders with the allPrivate Query Scope		<b>✓</b>		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
DISTANCE() Support with Location-based SOQL Queries		~		
Aliasing in SELECT convertCurrency() Statements		~		
Formatting for Number, Date, Time, and Currency Fields in SELECT Clauses		~		
REST API				
Make the Same Requests Using Fewer API Calls with Friendly URLs		~		
New Resource: Parameterized Search		~		
New Resource: SObject Relationships		~		
SOAP API				
Changed Calls		~		
Chatter REST API				
New and Changed Chatter REST API Resources		~		
New and Changed Chatter REST API Request Bodies		~		
New and Changed Chatter REST API Response Bodies		~		
Reports and Dashboards REST API				
Changed Reports and Dashboards REST API Request and Response Bodies		~		
Data.com API		~		
Bulk API				
JSON Support for Bulk API		~		
Streaming API				
Replay Generic Streaming Events (Generally Available)		~		
Replay PushTopic Streaming Events (Beta)		~		
Tooling API				
Tooling API New and Changed Objects		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Tooling API Calls and Methods		~		
Metadata API				
Metadata API Calls		~		
Metadata API Types		~		
Data Services				
Bulk API for BigObjects				~
Enhancements to Async SOQL (Pilot)				~
Salesforce Console API (Integration Toolkit)		~	~	
	ISVf	orce		
Turn AppExchange Checkout Data into Insights and Actions				~
Allocate More Seats in the License Management App		~		
Meet the New Environment Hub				
Create and Manage Orgs in Lightning Experience		~		
New Permissions Required to Create Orgs			~	
API Enhancements for ISV Partners				
Chatter REST API Enhancements		~		
Other API Enhancements		~		_

# Salesforce Overall: Lightning Experience Changes and More

Improve your overall Salesforce experience with the ability to change owners for more records in Lightning Experience. Plus, all new orgs now come with duplicate record management features turned on.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Supported	l Browsers		
Supported Browsers for Lightning Experience	<b>✓</b>			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers for Salesforce Classic	<b>✓</b>			
Duplicate Management Turned On for New Orgs		~		
Edition Name in Lightning Experience	<b>✓</b>			
Change Owners for More Types of Records in Lightning Experience	<b>✓</b>			
Edit Inline in Lightning Experience	<b>✓</b>			
Email Templates and Letterheads No Longer Support Scripts	<b>✓</b>			

# Help and Training

We offer more engaging content and improved limits documentation. We added walkthroughs and Trailhead modules and added and updated instructional videos. We also updated some of our trust and compliance documents.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
More engaging content where you need it most				
Improved Salesforce Limits				
Documentation				
Walkthroughs				
Videos				
Trailhead Modules				
Trust and Compliance Documentation				
Updates to the Security Implementation Guide				

# Lightning Experience: A New, Modern, Intelligent User Experience

It's here ... the new Salesforce 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. Learn about the benefits of this intuitive, efficient interface. Then decide when it's time to make the switch—the power is in your hands. (If you used person accounts in your production org before now, Lightning Experience is available within 24 hours after the Spring '16 release. Otherwise there's no wait.)

# EDITIONS

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

#### IN THIS SECTION:

#### What Makes Lightning Experience So Special

Welcome to Lightning Experience, the new, fast, beautiful user experience from Salesforce. With a sales-centric mindset, we focused on reinventing the desktop environment to better support your sales process. The result is an intuitive, intelligent interface that helps sales reps work more naturally and close more deals faster. Let's take a peek at some of the key features of the new interface so that you can decide if Lightning Experience is right for some or all of your users.

#### Lightning Experience Features in This Release

Here's the complete list of the powerful features and enhancements that make Lightning Experience the go-to interface for selling smarter and faster. Use this list to quickly access the details about each feature.

#### Is Lightning Experience Right for Your Salesforce Org?

So you're intrigued and excited about Lightning Experience! The new interface clearly offers numerous benefits for sales teams. But Salesforce is a deep well, and we can't rebuild everything at once. This release doesn't have complete parity with Salesforce Classic, the full-featured Salesforce predecessor. Let's look at some use cases, see how Lightning Experience compares to Salesforce Classic to help you decide if now is the right time to switch, and even see a preview of your org in the new interface.

#### Transition to Lightning Experience: Let's Do This!

Great! You've decided you're ready to switch to Lightning Experience. First, we recommend that you develop a strategy to guide your rollout. Then, when the time is right, here's how to enable the new user interface.

#### Find Your Way Around Lightning Experience

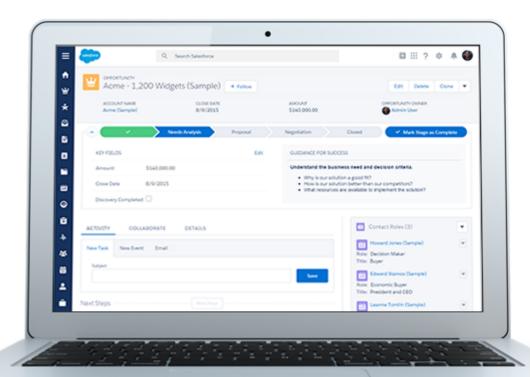
Feeling a little discombobulated by all the Lightning Experience newness? Perfectly understandable. Diving in to a redesigned app can be disorienting—especially when you're able to work in the original interface with your eyes closed. To hone your Lightning Experience chops, let's look at where some of the most common Salesforce features landed in the new interface.

#### Lightning Experience Considerations

This release of Lightning Experience doesn't include everything that's available in Salesforce Classic. Review these topics to see if any functionality that's critical to your business is limited or unavailable in this release. This information can also help you train users about what to expect when you do switch to Lightning Experience.

# What Makes Lightning Experience So Special

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Feature	Why It's Cool
Home	Start the day on the new, intelligent home page. Monitor performance to goal, and get insights on key accounts. And stay on track by seeing exactly what needs doing in the Assistant.
Opportunity Workspace	Drive the right behaviors at every stage of your sales process from this action-optimized workspace. You can customize coaching scripts for each step. And reps can work their deals more efficiently using the handy composer to quickly log calls, create tasks, send emails, and more.
Opportunity Kanban	Visually review the status of deals, organized by each stage in the pipeline. Users can drag deals from one stage to another, and get alerts when an action is needed on a key deal.
Composer Windows	Breeze through those minor but important activities that inevitably crop up during the day without switching context. Get a call from a customer while reviewing a report? It's no problem to quickly log the call—without needing to search for the related deal or switch to a different record. Composer windows open on the current page and let users log calls and create events, tasks, and notes that can be related to any record.
Activity Timeline and Task List	See open tasks, planned meetings, and accomplishments in the activity timeline on each opportunity, lead, account, and contact.  Or use the task list to see the details of specific tasks alongside the full list of open tasks, tasks due today, and closed tasks. Managers can use the Delegated view to see tasks assigned to people below them in the role hierarchy.

Feature	Why It's Cool
Accounts and Contacts	Find information and gather insights at a glance from the new layout. Get the latest news about customers with integrated Twitter and Account Insights for customers, review upcoming and completed activities, and keep data clean with field-level duplicate matching.
Enhanced Notes	Take better notes with auto-save, rich text capabilities, inline images, versioning, and the ability to relate a note to multiple records.
File Preview Player	Enjoy a richer file preview experience that doesn't require Adobe Flash Player. Vector-based preview images render in higher quality and don't degrade on high-resolution screens, plus they load faster. New controls allow scrolling through multi-page documents, previewing animated GIFs, giving full-screen presentations, and accessing file actions.
Reports and Dashboards	Get more from your data. The new report run page is easier to read and filter. Animated, interactive charts bring your organization's data to life. And a new dashboard editor supports flexible layouts and components that span columns and rows.
List Views	Seamlessly create and edit custom list views to rapidly find relevant data. See data faster with more intuitive list views. Visualize data with handy list view charts, or apply filters to slice the data as needed.
Search	Find records faster with improved search, which includes recent records and top results.
Setup Tree and Object Manager	Navigate setup pages with a simplified organization and a cleaner look and feel. Use the new Object Manager, which combines all standard and custom objects into a single list that is more easily searchable.

#### SEE ALSO:

*Trailhead*: Admin Trail - Migrating to Lightning Experience

Trailhead: Developer Trail - Lightning Experience

URL Custom Button and Link Support in Lightning Experience and Salesforce1

# Lightning Experience Features in This Release

Here's the complete list of the powerful features and enhancements that make Lightning Experience the go-to interface for selling smarter and faster. Use this list to quickly access the details about each feature.

### **Core Sales**

#### Person Accounts: Supported in Lightning Experience (Beta)

Person accounts take the standard business-to-business account model and extend it to include business-to-consumer sales, so you can capture information about individual people with whom you do business. With person accounts now available in Lightning Experience, Salesforce supports your sales process like never before.

#### Account Insights: Better Display and Navigation in Lightning Experience

We've made several improvements to how Account Insights displays news, so your users can get instant access to even more relevant, more timely news than ever before.

#### Account Insights: Improve the Relevancy of News in Lightning Experience

When viewing insights, users can provide feedback to Salesforce to help improve the relevancy and appropriateness of what's included.

#### Campaigns: Drum Up New and Repeat Business in Lightning Experience (Beta)

Generate and track outbound marketing campaigns that drive business to your company. Sales and marketing teams import campaign members, update their statuses, and see the impact that the campaigns have on related deals in the pipeline.

#### **Opportunity Board Is Now Opportunity Kanban**

Opportunity Kanban visually summarizes all of the opportunities for an opportunity record type. It's more than just a board: this tool helps your reps keep their deals on track and moving forward. The word *kanban* refers to a system for optimizing work to increase continuous production and balance workload.

#### **Team Up to Close Deals in Lightning Experience**

Your sales reps can now increase and simplify a sales team's access to opportunities by putting together a winning opportunity team in Lightning Experience. Opportunity team members have increased access to the opportunity and its related records.

# Sales Productivity

#### List Views: Find Data Faster in Lightning Experience

With the ability to create and edit custom list views and filters in Lightning Experience, sales and service professionals can take advantage of powerful ways to rapidly find relevant data. They can also resize columns to optimize their viewing area in object home and list views.

#### Home: Keep Tabs on Your Meeting Schedule and Task List

Home is now even more of a control center for your sales reps. They can now see upcoming meetings, tasks that are due today, and more information about relevant accounts without leaving the Home page.

# Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience

Sales and service pros can achieve a whole new level of multitasking with global actions and the new composer window. From the Global Actions menu, it's easy to jot down a quick note or log a call without switching away from other work in progress. The menu serves up frequently used global actions—the same ones available in Salesforce Classic and the Salesforce1 mobile app. The menu frees teammates from having to search for the right record before knocking off a to-do item. And no more juggling several browser tabs to create multiple notes or activities at the same time. Global actions open in composer windows on the current page.

#### Email: Be More Productive with a Pop-Out Composer Window, Updatable Templates, and More in Lightning Experience

Lightning Email offers efficiency and usability upgrades plus full support for Campaigns and partial support for Person Accounts (Beta in Lightning Experience) and Cases. Users can compose email in a handy pop-out window. They can also search for merge fields to use in templates or individual emails. With Automatic BCC, users can get copies of sent emails in their inboxes. If recipients have opted out of receiving mass emails, users see an opt-out indicator. And we notify users before they send if email to a recipient has bounced before.

#### Activities: Keep Up with the Speed of Business in Lightning Experience

New ways of creating and managing events and tasks help your sales reps keep up with their deals and accounts better than before.

#### Notes: Compose from Any Lightning Page and Let Reps Restore Previous Versions

The enhanced version of Notes offers increased flexibility, allowing sales reps to create a note from any Lightning page. Reps can also view or restore previous versions of a note, and include images in their notes.

#### **Unresolved Items: Available in Lightning Experience**

When Salesforce sends email items it couldn't assign to records to the Unresolved Items queue, reps can manage those items directly from Lightning Experience.

#### **Data Import Wizard: Import Data from Some Object Home Pages**

Sales reps now save time and clicks when they access the Data Import Wizard directly from certain sales objects home pages.

# Reports and Dashboards

#### Reports and Dashboards: Analyze Your Data in Lightning Experience

A whole slew of new features gives Lightning Experience Reports and Dashboards more parity with their Salesforce Classic counterparts. Switch to Lightning Experience, then filter your dashboards, view them as someone else, and read tabular data. Show or hide details of matrix reports, which are now fully supported. Change the color of your charts, and set reference lines. Run, edit, or delete reports and dashboards directly from list views.

#### Service

#### Assets

With assets now available in Lightning Experience, your sales and support processes just got easier.

#### **Case Feed**

Emails in case feed are now easier to use and support agents can insert predefined email templates or create their own.

#### Work Orders

Work orders make it possible to track work to be performed on your customers' products, making life easier for support agents and field technicians.

#### Chatter

#### Broadcast Groups in Lightning Experience—Generally Available

Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can create posts. Group members can respond to posts. Creating broadcast groups is ideal when one person or a set of individuals regularly needs to share information with a large group of people.

#### Add Fun and Color to Groups with Banner Images

Update group banners with your own images to include your company's branding on your group page or to add a bit of fun and color. Previously, groups in Lightning Experience used distinct, non-customizable banner images for public, private, and unlisted groups.

#### **Lightning Experience Now Supports Customer Groups**

Create groups that allow customers and add customers to those groups in Lightning Experience.

#### Jazz up User Profiles with a Banner Photo

A banner photo allows your users to personalize how their profile looks when other users view it. It appears at the top of the profile page in Lightning Experience. Your users can upload any photo, but we recommend using a panoramic photo that is at least 1280 x 300 pixels.

#### **Improved Photo Upload and Editing Experience**

We simplified the profile photo experience by adding a drop-down menu that appears when a user clicks the upload icon. The user can then quickly choose to view, update, or delete their photo.

#### **Circular Photo Preview**

When a user uploads a photo, the preview should look exactly like what appears on their profile. We improved the photo experience, so that a user sees a circular version of their photo when previewing or cropping.

#### **Profile Photos on the People Page**

Whether it's a picture of your four-legged friend, a superhero, or your best glamour shot, photos help people recognize and learn about each other. We made the People page more useful and fun by adding users' photos.

#### **More Chatter Users Can Access Lightning Experience**

Users with Chatter Free, Chatter Plus, and Chatter External licenses can now use Lightning Experience.

#### **More Relevant @Mention Suggestions**

Now, it's quicker than ever to keep everyone informed. User @mention suggestions are more relevant and list users who you interact with the most instead of an alphabetical list. Also, you see a customer on the list only when you're in a group where the customer is a member, and not in other contexts.

#### Refresh the Chatter Feed Lightning-Fast in Lightning Experience

See poll results or your coworkers' comments on your Chatter post faster than before. Users can now refresh a Chatter feed without refreshing the entire page.

#### **Files**

#### **Files Without Chatter**

Now you can use Salesforce Files whether Chatter is on or off! You don't use Chatter, but you want to take advantage of the awesome features of Salesforce Files? No problem! Your files are welcome here.

#### **Share Files with People and Groups in Lightning Experience**

Sharing files has never been easier. Share a file directly with people and groups. Manage access to the file in one place. Control whether others can share and unshare a file. Save typing time by adding recommended people and groups.

#### **Preview Files Connect External Google Docs in Lightning Experience**

Now playing in the Lightning file preview player: Google Docs! If you have Google Drive set up as one of your Files Connect external sources, your view just got better. Google Docs, Sheets, and Slides display beautifully in the file preview player in Lightning Experience.

#### Browse Files Connect External Sources When Selecting Files in Lightning Experience

Now you can browse Files Connect external sources such as Google Drive, Box, and SharePoint when selecting a file to attach to a feed post in Lightning Experience.

#### Open Files from SharePoint Online and OneDrive for Business With One Click

Using Files Connect to access files from SharePoint Online and OneDrive for Business just got a whole lot easier. Now, when users click to open a file, they're redirected to the appropriate Microsoft online app (such as Word, Excel, and PowerPoint) instead of the file detail page. And fewer clicks means better use of time.

#### **Navigate Libraries in Files Home in Lightning Experience**

Files home in Lightning now lets you view the libraries you have access to, and navigate those libraries to see the files they contain.

#### View Multi-File Community Record Feed Posts in Lightning Experience

Community users can now attach multiple files to a single post. When a multi-file feed post on a record in a Community is viewed in Lightning, multiple thumbnails and previews are displayed.

#### Search

#### Synonym Groups Enabled for More Objects and Maximum Limit Increased

All your synonym groups are now available in Salesforce Knowledge articles, cases, Chatter feeds, files, ideas, and questions. The synonym group maximum limit per org also increased from 3,000 to 10,000. Users see more relevant search results in just one search.

#### **Spell Correction Expanded to More Objects**

When users enter a search term that doesn't yield results, they see results that match a corrected spelling of the search term in Salesforce Knowledge articles, Chatter feeds, Chatter groups, files, and questions. Spell correction is available only in English.

#### **Get Metrics on How Your Users Search for Files**

Use the File Search Activity custom report type to review average click rank, number of search results returned, and the search terms users are entering for the top 300 search terms queried by users. Based on the report information, determine if users are finding the files they need or if file editing or creation is required.

#### Find a Record Faster with Search Results Sorting

If available, search results pages now include a sort drop-down. In addition, users can click the column headers to sort results. Users find sorting helpful when faced with too many search results, even within a specific object type.

#### **Instant Results Look Even Better**

The improved field formatting for number, date, time, and address fields in instant search results helps users pick the right record. When possible, auto-suggested instant results include a secondary field below the record name that has more contextual information from search layout fields. The additional information, such as location, makes choosing the right auto-suggested record easier.

#### More Objects Searchable in Lighting Experience

Users now see results for assets, campaigns, person accounts, work orders, and work order line items in search results.

#### Create a Custom Object Item from Within a Lookup

Using the **New** button, users don't have to leave the lookup window to create records to complete a lookup field, so they can complete their tasks faster.

#### Data.com

#### **Data.com Prospector**

In this release, we made several key Data.com Prospector features available in Lightning Experience. Search millions of crowd-sourced contacts to get the right contacts at your accounts. Check out Prospecting Insights, which provides key business, financial, company hierarchy, and industry data on your accounts. Using our Company Hierarchy, view an account's corporate hierarchy and add new accounts to Salesforce with a click.

#### **Data.com Clean**

Now Data.com Clean offers even more ways to maintain high-quality data and keep your records complete and up-to-date. Using our new clean rules, you can add vital company information to your Salesforce leads. Then your reps get the information they need when they need it.

### **General Administration**

#### **Customize the Navigation Experience for Lightning Experience Users**

Before this release, everyone had the same navigation menu. Now you can create different menus and tailor the navigation experience for your various types of users, such as sales reps, sales managers, and execs. You can add, remove, and move items so that users can go to the places they use most often with a single click. This feature is available in Lightning Experience only.

#### **URL Custom Button and Link Support in Lightning Experience and Salesforce1**

Custom buttons and links that define their content source as URL are now supported in Lightning Experience and the Salesforce mobile app.

#### Delegate Admin Privileges to Select Users from Setup in Lightning Experience

You can now use Setup in Lightning Experience to assign limited admin privileges to users who aren't administrators. Delegating specific tasks to particular users allows you to focus on other work. For example, make the Customer Support team manager a delegated administrator to manage users in the Support Manager role and all subordinate roles.

#### Formula Field Support in Lightning Experience

Formula fields with hyperlinks and images are now supported in Lightning Experience.

# Setup

#### Migrate to Lightning Experience like a Boss

Whether you're curious if Lightning Experience is right for your organization, or you're ready to make the leap, Migration Assistant is here to guide you each step of the way.

#### **Communities Setup is Now Available in Lightning Experience**

You can now enable and change settings for Communities in the Setup menu in Lightning Experience. The full Salesforce Communities product is not supported in Lightning Experience, so to create, manage, or use your communities, you must use Salesforce Classic.

#### Setup: Right-Click to View in a New Tab or Window in Lightning Experience

Conveniently open a Setup node or a user's personal settings in a new tab or window by using your browser's right-click functionality. In Lightning Experience, this functionality works on all Setup nodes. It doesn't work on individual pages within Setup.

# Lightning App Builder

#### **Deletion of Custom Lightning Experience Record Pages (Pilot)**

In Winter '16, we warned you that pages created as part of the pilot to customize record pages in Lightning Experience would revert to the default page experience. We're keeping that promise. In Spring '16, all custom Lightning Experience record pages that you created in the Lightning App Builder in Winter '16 will be deleted.

#### Create Custom Tab Sets on Record Pages in Lightning Experience (Pilot)

Use the Tabs component to add a set of tabs to a region of your Lightning Page. Choose from a set of standard tabs or create custom tabs to enhance record pages for your Lightning Experience users.

#### Create Custom Lightning Experience Record Pages from Scratch in the Lightning App Builder (Pilot)

In Winter '16, the only way to create a record page in Lightning Experience was to clone it using Edit Page from the Setup menu. Now you can also create record pages from scratch via the New button on the Lightning App Builder list page. Select from various page templates to create an even more customized record page for your Lightning Experience users.

#### **Auto-Suggestion of Results in Lightning App Builder Drop-Down Menus**

When searching for items in drop-down menus in the Lightning App Builder, you can now enter a few characters, and all available matches display as you type.

#### **Data Customization**

#### Import Person Accounts with the Data Import Wizard

To provide users with the best experience, Salesforce has begun retiring the individual import wizard for person accounts. The individual person account import wizard is no longer available in Setup. But don't worry! You'll be even more productive with the unified Data Import Wizard.

# Development

#### **Visualforce for Lightning Experience (Beta)**

This release contains a beta version of Visualforce for Lightning Experience that is production quality but has known limitations.

#### Add Visualforce Pages to the Lightning Experience Navigation Menu

Customize the Lightning Experience navigation menu by adding Visualforce tabs.

### Use User.UITheme and UserInfo.getUiTheme() to Determine User Experience Context

The User.UITheme and User.UIThemeDisplayed global variables and the UserInfo.getUiTheme() and UserInfo.getUiThemeDisplayed() Apex utility methods are improved to support the Salesforce1 mobile app and Lightning Experience.

#### Improved Performance with Secure Client-Side Caching

We've added secure data caching in the browser to improve page reload performance by avoiding additional round trips to the server.

#### **Create and Manage Orgs in Lightning Experience**

The Environment Hub is now available in Lightning Experience. Create and manage your development, testing, and trial orgs in an intuitive, efficient user interface.

#### General Enhancements

#### **Edition Name in Lightning Experience**

Your Salesforce organization edition can now be found on the company information page in Lightning Experience. In Salesforce Classic the edition is still shown in the browser tab and the Company Profile page.

#### **Change Owners for More Types of Records in Lightning Experience**

Your users can now change record owners for work orders and campaigns, and assign some records, like leads, cases, work orders, and custom objects, to queues in Lightning Experience.

# Is Lightning Experience Right for Your Salesforce Org?

So you're intrigued and excited about Lightning Experience! The new interface clearly offers numerous benefits for sales teams. But Salesforce is a deep well, and we can't rebuild everything at once. This release doesn't have complete parity with Salesforce Classic, the full-featured Salesforce predecessor. Let's look at some use cases, see how Lightning Experience compares to Salesforce Classic to help you decide if now is the right time to switch, and even see a preview of your org in the new interface.

EDITIONS

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

Currently, Lightning Experience is geared toward sales teams, so most features from other Clouds aren't available yet. And some Sales features aren't available either. Although Lightning Experience

will expand to include more features in upcoming releases, evaluate how important these upcoming features are to your business needs right now.

Keep in mind that you can enable Lightning Experience for a subset of your users. This flexibility means you can move your Sales team to the new interface now, but have your Service org continue using Salesforce Classic. Or you can opt to run a Lightning Experience pilot with a small group of users without disrupting everyone else until you know that the new experience provides what you need.

#### IN THIS SECTION:

#### Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

Salesforce Classic is still here, and we've made it easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, you and your users can try it on for size without losing out.

#### Supported Editions and User Licenses for Lightning Experience

Let's take a look at the supported editions and user licenses to see if your organization can enable and use Lightning Experience.

#### Best Use Cases for Lightning Experience

Let's look at the types of organizations that are a good fit for this release of Lightning Experience. And also some uses cases that might not be suitable just yet.

#### Compare Lightning Experience and Salesforce Classic

Understanding what you get—and don't get—in the new interface is a big part of the decision to switch to Lightning Experience. Here are some highlights of how Lightning Experience compares to what you're used to in Salesforce Classic.

#### What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing configurations and customizations in Lightning Experience. Many of your point-and-click and programmatic implementations also work seamlessly in the new interface. However, some customizations don't apply in the new interface or require updating to take advantage of all that Lightning Experience has to offer. Here are some issues to consider.

#### Preview Your Org in Lightning Experience

This is probably the point where you're thinking: "Yeah, yeah, but I want to see this thing." But you're not ready to switch your users over yet, so quandary, right? Nope! Lightning Experience Migration Assistant to the rescue. The Migration Assistant's Preview feature lets you explore your production org in Lightning Experience, so you can see exactly how your real data and your current customizations work in the new interface. Without disrupting anyone.

#### SEE ALSO:

Supported Editions and User Licenses for Lightning Experience Supported Browsers for Lightning Experience Lightning Experience Considerations

# Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

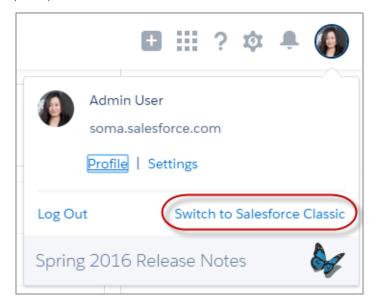
Salesforce Classic is still here, and we've made it easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, you and your users can try it on for size without losing out.

When users are first enabled for Lightning Experience, the new interface is their default, *preferred* experience. Ideally, your Lightning Experience users find that the new interface meets all their needs. But if there's an important feature or tool back in the classic interface, they can switch to Salesforce Classic at any time, without assistance from you.

To head back to Salesforce Classic, use the Switcher. In the Lightning Experience header, click the profile picture and select **Switch to Salesforce Classic**.



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



The Switcher changes the default preference to Salesforce Classic. The user remains in the classic interface until using the Switcher to return to Lightning Experience. And then the new interface becomes the default preference. You get the idea.

To find the Switcher in Salesforce Classic, click the name in the upper-right corner, then select **Switch to Lightning Experience**.



The fact that your users have the power to move themselves between interfaces probably affects your decision about when to start using Lightning Experience. If Lightning Experience is missing only a few features that your team uses occasionally, asking users to switch between interfaces can be an acceptable trade-off given the benefits of the new experience. But it's best to keep users who need daily access to unsupported sales features or who work regularly with service features in Salesforce Classic—at least for now.

#### SEE ALSO:

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Set Up Users for Lightning Experience

What's Not Available in Spring '16 Lightning Experience Features

# Supported Editions and User Licenses for Lightning Experience

Let's take a look at the supported editions and user licenses to see if your organization can enable and use Lightning Experience.

#### **Editions**

#### **Supported Editions**

- Group Edition
- Professional Edition
- Enterprise Edition
- Performance Edition
- Unlimited Edition
- Developer Edition

#### **Unsupported Editions**

- Personal Edition
- Contact Manager Edition
- Database.com Edition
- Chatter.com Edition

#### **User Licenses**

#### **Supported Licenses**

- Salesforce
- All Salesforce Platform and Force.com (excluding Force.com Free)
- Identity User
- Company (Employee) Community

#### **Unsupported Licenses**

- Customer Community, Customer Community Plus, Partner Community
- All Portal licenses
- Force.com Free
- Data.com
- Work.com
- Database.com
- Content Only
- Ideas Only
- Knowledge Only
- Site.com Only

# Best Use Cases for Lightning Experience

Let's look at the types of organizations that are a good fit for this release of Lightning Experience. And also some uses cases that might not be suitable just yet.

Consider using Lightning Experience for some or all of your organization if:

- Your sales team does business-to-business sales using accounts, contacts, leads, opportunities, custom objects, and the other sales features supported in the new user interface.
- You want to pilot the new user interface with a group of sales reps.
- You're looking to reboot your Salesforce implementation. This is a great opportunity to introduce new features because you're doing change management anyway.

Consider sticking with Salesforce Classic if:

- Your sales team makes regular use of features that aren't yet available in Lightning Experience, such as quotes, forecasting, or territory management.
- You primarily use customer service tools or other non-sales features.
- You want a single experience for your sales and service teams.

# Compare Lightning Experience and Salesforce Classic

Understanding what you get—and don't get—in the new interface is a big part of the decision to switch to Lightning Experience. Here are some highlights of how Lightning Experience compares to what you're used to in Salesforce Classic.



**Note**: These lists aren't a complete view of what's not available in Lightning Experience. Also read Lightning Experience Considerations to help make your decision.

# EDITIONS

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

### Salesforce Data

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Sales objects: Accounts, Campaigns, Contacts, Leads, Opportunities, Person Accounts, Price Books, Products	✓	✓	
Calendar, Events, Tasks	✓	✓	
Service objects: Assets, basic Cases, Work Orders	✓	✓	
Custom objects	✓	✓	
Chatter feeds, groups, and people	✓	✓	
Salesforce Files	✓	✓	
Other Sales and Service objects		✓	

### Home

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Performance chart	✓		
Assistant	✓		
Account Insights	✓		
Top deals	✓		
Tasks	✓	✓	
Events*	✓	✓	
Calendar*		✓	
Feed and publisher		✓	
Items to approve		✓	
Customizable dashboards		✓	
Customizable home page components		✓	

<sup>\*</sup> In Lightning Experience, Home displays only events remaining on a user's calendar today. Users can access all their events from the calendar link on Home or from the default navigation menu.

# **Accounts and Contacts**

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Account Insights	✓		
Activity Timeline	✓		
Enhanced Notes	✓		
"Reference" page layout	✓		
Related lists	✓	✓	
Integrated email and templates	✓	✓	
Twitter highlights	✓	✓	
Person Accounts	✓	<b>✓</b>	
	(Beta Support)		
Account teams		✓	
Account and contact hierarchy		✓	

# Campaigns (Beta)

Feature	<b>Lightning Experience</b>	Salesforce Classic
Campaign member status charts	✓	
Import campaign members	✓	✓
Add individual campaign members	✓	✓
Campaign member status updates via import	✓	✓
Clone campaign members		✓
Add and manage campaign members from a list view		✓

# Leads

Feature	Lightning Experience	Salesforce Classic
Workspace page layout	✓	
Activity Timeline	✓	
Sales Path	✓	
Enhanced Notes	✓	

Feature	<b>Lightning Experience</b>	Salesforce Classic
Change lead owner to a queue	✓	✓
Integrated email and templates	✓	✓
Lead conversion customization via the API	✓	✓
Find and merge duplicate leads		✓

# Opportunities

Feature	Lightning Experience	Salesforce Classic	
Workspace page layout	✓		
Activity Timeline	✓		
Sales Path	✓		
Enhanced Notes	✓		
Visual view of opportunities (Kanban)	✓		
Integrated email and templates	✓	✓	
Opportunity teams	✓	❖	
Opportunity splits		✓	
Similar opportunities		✓	
Big deal alerts		✓	

# Data.com

Feature	Lightning Experience	Salesforce Classic	
Prospect for contacts and companies	✓	✓	
Clean status of clean rules	✓	✓	
See how clean rules are working	✓	✓	
Add Data.com contacts as leads		✓	

# Reports

Feature	Lightning Experience	Salesforce Classic
Enhanced report charts	✓	
Hide totals and subgroups from report view	✓	

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Create interactive filters when viewing reports	✓		
Report Builder	✓	✓	
Bucket fields	✓	✓	
Custom summary formulas	✓	✓	
Matrix, Summary, Tabular report formats	✓	✓	
Table, Funnel chart types	✓	✓	
Report folder sharing*		✓	
Create report folders		✓	
Joined reports		✓	
Cumulative Line, Multimetric, Pie, Scatter chart types		✓	
Schedule report refreshes		✓	
Follow reports		✓	
Report notifications		✓	
Export reports		✓	

<sup>\*</sup> You can't set up folder sharing in Lightning Experience; however, folders that were created in Salesforce Classic inherit all assigned permissions when viewed in Lightning Experience.

# Dashboards

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Display more than 3 columns	✓		
Dashboard Builder	✓	✓	
View filtered dashboards	✓	✓	
View dynamic dashboards	✓	✓	
Schedule dashboard refreshes*		✓	
Post dashboard components to feeds		✓	
Follow dashboards		✓	
Visualforce components		✓	

#### List Views

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Charts	✓		
Create filters on the fly	✓		
Create and edit lists	✓	✓	
Sortable columns	✓	✓	
Resizable columns	✓	✓	
Sharing Settings*	✓	✓	
Advanced filter logic		✓	

<sup>\*</sup> In Lightning Experience, sharing list views marked as "Visible only to me" or "Visible to all users" is supported. Sharing with certain groups of users isn't supported.

### Other Features and Products

Feature	<b>Lightning Experience</b>	Salesforce Classic	
Activities-related composer windows	✓		
Create and edit records	✓	✓	
Inline editing record detail fields	✓	✓	
Inline editing in lists		✓	
Forecasting		✓	
Territory Management		✓	
Salesforce Communities*		✓	
Partner Portals		✓	
Service Cloud		✓	
Work.com		✓	

<sup>\*</sup> Setup for Salesforce Communities is available in Lightning Experience but creating, managing, and working in your communities is only available in Salesforce Classic.

<sup>\*</sup> Users can't schedule dashboards in Lightning Experience, but dashboards scheduled in Salesforce Classic run as expected in Lightning Experience.

# What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing configurations and customizations in Lightning Experience. Many of your point-and-click and programmatic implementations also work seamlessly in the new interface. However, some customizations don't apply in the new interface or require updating to take advantage of all that Lightning Experience has to offer. Here are some issues to consider.

#### Lightning Experience Navigation Menu

Lightning Experience replaces the Salesforce Classic tab bar with a collapsible navigation menu along the left side of the page. Customizations made to the tab bar in the classic interface aren't reflected in the navigation menu. Instead, you can create multiple custom navigation menus and assign them to user profiles. Which means you can empower different types of users, like sales reps, sales managers, and execs, with a navigation experience that's unique to their business needs.

You can add a wide variety of items to a custom navigation menu, including many standard Salesforce objects, your custom objects, Lightning component and Visualforce tabs, and other items like Home, the main feed, people, groups, files, dashboards, reports, and the user's task list and calendar.

In fact, most of the items that appear in the App Launcher can go in a custom navigation menu. The few exceptions include connected apps, Lightning Page tabs, and some Salesforce objects that aren't supported in Lightning Experience. Items that can't go in a custom navigation menu are always available from the App Launcher by clicking in the header.

To learn more, see Customize Lightning Experience Navigation Menus and Navigation and Actions: What's Not in Lightning Experience in the Salesforce Help.

### Page Layouts and Compact Layouts

Record page customizations made in Salesforce Classic—for custom and standard objects—also affect record pages in Lightning Experience. However, some page elements display differently in Lightning Experience, and some aren't supported.

Compact layouts play the same role in Lightning Experience that they do for the Salesforce1 mobile app: displaying a record's key fields in the highlights panel on a record page. In Lightning Experience, the highlights panel shows the first five fields from your current compact layouts.

#### **Actions and Buttons**

If you've already created and used actions in Salesforce Classic, you know that they appear in the Chatter publisher, while standard and custom buttons appear above the details on a record page. And if you use Salesforce1, you know that all action types and buttons are co-mingled on the Salesforce1 action bar. In Lightning Experience, we continue to blur the line between actions and buttons. But instead of displaying in a single place, actions and buttons are grouped by type in several different areas on the record page.

By default, Lightning Experience includes the actions and buttons defined in the Salesforce 1 and Lightning Experience Actions section on the global publisher layout. Or you can customize what's available using the same section on object page layouts. Here's the logic that determines where on the record page an action or button appears.

- Global actions with the Log a Call action type or the Create a Record action type for events, notes, and tasks display in the Global Actions menu in the header.
- Most guick actions, productivity actions, standard buttons, and supported custom buttons are added to the page-level action menu.
- Object-specific activities-related actions, such as Log a Call, New Event, New Task, and Email, display in the composer on the Activity tab.
- Standard Chatter actions appear in the composer on the Collaborate tab.

The order of actions in each area is based on the order in which they've been added to the global publisher or object page layout.

To learn more, see Actions in Lightning Experience in the Salesforce Help.

#### **Custom Buttons**

Custom buttons that use a JavaScript content source aren't supported in Lightning Experience. You can replace some of the functions covered by these buttons by using point-and-click tools, like Process Builder, Visual Workflow, or code-driven approaches.

Custom buttons that define the content source as a URL or Visualforce page work as you'd expect.

#### Visualforce and Lightning Components

Yes, Lightning Experience is a major change from Salesforce Classic, but that doesn't mean your Visualforce pages stop working. This release includes beta support for Visualforce in Lightning Experience. Your existing Visualforce pages work in Lightning Experience, many without needing any revisions. Because things have moved around in the new interface, you'll want to complete some chores to make sure your Visualforce pages work the way you expect. And at this point, a few Visualforce features don't work in Lightning Experience.

Here are a few basic details to consider.

- If your Visualforce pages use JavaScript, there are things you need to check. Visualforce doesn't "own" the whole page when shown in Lightning Experience, and because of that, your JavaScript code needs to play by some new rules.
- If your Visualforce pages use the built-in standard components, their look-and-feel matches Salesforce Classic, whether users access them in the new or old interface. Some work is needed if you want your pages to match the Lightning Experience styling.
  - To help with this effort, we're publishing the Salesforce Lightning Design System (SLDS), a collection of design patterns, components, and guidelines for creating interfaces that fit in with Lightning Experience. The SLDS is available at www.lightningdesignsystem.com.

For the complete skinny on what works and doesn't work, see the "Visualforce & Lightning Experience" module in the Developer Trail - Lightning Experience Trailhead trail.

What about new UI customization? The Lightning Component framework is our new UI framework for developing dynamic web apps for both desktop and mobile devices. You can use it or Visualforce in your new projects. To learn more about UI development, see "User Interface Development Considerations" in the Lightning Experience Development Trailhead module. To learn more about Lightning Components, see the "Lightning Components" module in the Developer Trail - Lightning Experience Trailhead trail.

#### Force.com Canvas

Force.com Canvas allows you to easily integrate third-party applications in Salesforce. Canvas functionality in Lightning Experience is the same as in Salesforce Classic. You can still embed Canvas apps in Visualforce pages and everywhere else they're supported, with the added bonus that you can expose Canvas apps in Lightning Components.

#### Salesforce APIs and Apex

Most of the programmatic tools and processes you're used to are largely unaffected by Lightning Experience. We've kept our promise that our new releases won't break your dependencies on Salesforce APIs. Tools like Workbench haven't changed. Your development environment is the same as ever.

While your Apex classes and API calls work fine, some features aren't yet supported in Lightning Experience. If a user is in the new interface and executes some Apex code that interacts with an unsupported feature, the user can't complete the task. To address this scenario, we've added capabilities to determine a user's interface preference from both the API and Apex. You can use this functionality to add logic to your existing code so that your users don't encounter errors. See "Understanding Changes to Other Development Tools" in the Lightning Experience Development Trailhead module for full details.

### AppExchange Apps

Many apps from the AppExchange feature customizations, including custom objects, custom buttons, Visualforce pages, and more. Salesforce partners are testing their apps in Lightning Experience and applying for *Lightning Ready* certification. Apps that are Lightning

Ready work in Lightning Experience and offer a more consistent experience with other Lightning Pages. If an app is supported in Lightning Experience, a Lightning Ready sash appears on its AppExchange listing. If an app isn't supported in Lightning Experience, use it in Salesforce Classic instead.



**Note:** Your org can use apps without Lightning Ready certification in Lightning Experience, but some features might not be available or work as expected. These apps can also appear visually inconsistent with Lightning Experience because they use Salesforce Classic styling. For the best experience, use Salesforce Classic for apps that aren't certified as Lightning Ready.

#### SEE ALSO:

Salesforce Help: Actions in Lightning Experience
Salesforce Help: How Actions Are Ordered in Lightning Experience

# Preview Your Org in Lightning Experience

This is probably the point where you're thinking: "Yeah, yeah, but I want to see this thing." But you're not ready to switch your users over yet, so quandary, right? Nope! Lightning Experience Migration Assistant to the rescue. The Migration Assistant's Preview feature lets you explore your production org in Lightning Experience, so you can see exactly how your real data and your current customizations work in the new interface. Without disrupting anyone.

The Preview feature isn't a locked-down, read-only tour. You can change data, settings, permissions—you name it. But remember that you're working with your live org. If you do make changes, they're for real and visible to your users back in Salesforce Classic.

To get started, from Setup, enter *Lightning* in the Quick Find box, then select **Lightning Experience**. Click **Preview** to dive in.

### **EDITIONS**

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

#### **USER PERMISSIONS**

To view the Lightning Experience Migration Assistant:

"View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:

"Customize Application"

# Transition to Lightning Experience: Let's Do This!

Great! You've decided you're ready to switch to Lightning Experience. First, we recommend that you develop a strategy to guide your rollout. Then, when the time is right, here's how to enable the new user interface.

#### IN THIS SECTION:

Develop Your Lightning Experience Rollout Strategy

One of the best investments you can make in your Lightning Experience rollout is to have a clear plan. A plan helps you do things in the right order, identify key resources, communicate with everyone, and have a clear end date in mind.

# EDITIONS

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

#### **Enable Lightning Experience**

Turning on Lightning Experience is a very simple task—just flip the switch! But we recommend that you set up a few other features first so your users get the full power of the new interface when you enable Lightning Experience. Then you set up the appropriate users to access Lightning Experience. You can choose to start slow and roll out the new interface to a small pilot group, or jump in and turn it on for everyone in your organization.

# **Develop Your Lightning Experience Rollout Strategy**

One of the best investments you can make in your Lightning Experience rollout is to have a clear plan. A plan helps you do things in the right order, identify key resources, communicate with everyone, and have a clear end date in mind.

Depending on the size of your organization, you could be working with a Change Management department or have a project manager assigned to the rollout. Or perhaps you're the one charged with organizing and executing the rollout from start to finish. However the work gets divvied up, use the Lightning Experience Rollout module in *Admin Trail - Migrating to Lightning Experience* from Trailhead to help with this process.

Your rollout will likely fall into these phases.

#### Learn

- Learn about Lightning Experience
- Identify stakeholders and an executive sponsor
- Educate your company with presentations and demos
- Review Compare Lightning Experience and Salesforce Classic and Lightning Experience Considerations
- Conduct a gap analysis to confirm you're getting what you need

#### Launch

- Identify users for a pilot of Lightning Experience
- Identify and activate super users
- Create the project schedule
- Define measures for success
- Create and execute your marketing and training strategies
- Customize and test, ideally in a sandbox environment
- Go live!

#### Iterate

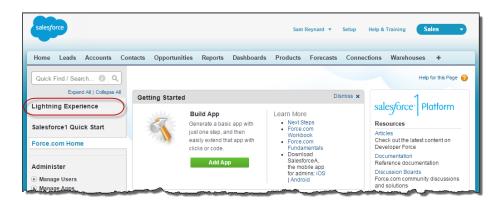
- Evaluate how things are working to see if you're hitting your success metrics
- Survey your users for satisfaction and pain points
- Use reports and dashboards to track metrics and feedback
- Deliver an executive summary

To jump-start your planning, download the Lightning Experience Customer Enablement Pack that's part of the Lightning Experience Rollout module. The Enablement Pack is chock-full of valuable resources, like a presentation deck, a risk severity matrix, a project schedule template, a sample email drip campaign, and a rollout checklist to keep you focused and on track.

### **Enable Lightning Experience**

Turning on Lightning Experience is a very simple task—just flip the switch! But we recommend that you set up a few other features first so your users get the full power of the new interface when you enable Lightning Experience. Then you set up the appropriate users to access Lightning Experience. You can choose to start slow and roll out the new interface to a small pilot group, or jump in and turn it on for everyone in your organization.

Use the Lightning Experience Migration Assistant as your control center for tackling these steps. From Setup in Salesforce Classic, click **Lightning Experience**.



### **EDITIONS**

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

#### IN THIS SECTION:

#### Recommended Features for Lightning Experience

If you haven't already, consider enabling and setting up several "supporting" features before turning on Lightning Experience. These features ensure that the new user interface is fully optimized to help your sales reps sell faster and smarter.

#### Set Up Users for Lightning Experience

Next up, make sure that the desired users get access to Lightning Experience. By default, the "Lightning Experience User" permission is automatically enabled for all users with a standard Salesforce profile. But you can fine-tune access to Lightning Experience with custom profiles or permission sets. Meaning you can do a limited rollout to a pilot group or enable a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. The power is yours.

#### Turn on Lightning Experience for Your Org

You've knocked off the "Learn" and "Launch" items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users—and they're trained and expecting the exciting changes coming their way. You're ready to go live! Fortunately, it's easy to turn on Lightning Experience using the Migration Assistant.

#### SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

### Recommended Features for Lightning Experience

If you haven't already, consider enabling and setting up several "supporting" features before turning on Lightning Experience. These features ensure that the new user interface is fully optimized to help your sales reps sell faster and smarter.

#### **Related Files**

Leverage the rich features and flexibility of Salesforce Files from standard Salesforce objects and your custom objects. Add the new Files related list to page layouts so that users can upload files to records, see files associated with records, and quickly page through files in the modern, visually rich preview player.

# EDITIONS

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

#### **Enhanced Notes**

Help your users stay organized with our enhanced note-taking tool. It's a breeze to create rich-text notes and quickly relate them to specific records. When you turn on Notes, remember to add the new Notes related list to page layouts so that your users can create and read notes directly from their records.

#### **Sales Path**

Make it easy for sales reps to follow your organization's sales process and get deals to closed. Customize your opportunity stages and lead statuses, and the order you want them to appear in the Sales Path on opportunity and lead workspaces. Then take it up another notch and add your own coaching steps for each stage or status in the Sales Path.

### **Duplicate Management**

Create duplicate rules to alert users if they're about to create a duplicate record. Craft your duplicate rules to control whether and when users can create duplicate records in Salesforce.

#### **Lead Conversion**

Keep your sales process moving by allowing your sales reps to convert qualified leads to contacts, accounts, or opportunities. Add the Convert button to the Lead page layout.

#### **Account Insights**

Give your reps instant access to relevant, timely news articles about their accounts. This feature is available in English only, so if your organization uses a different primary language, you might not want this option. (For information about privacy issues with this feature, see Account Insights in the Salesforce Help.)

#### Social Accounts, Contacts, and Leads

Keep the team up to date by letting reps link their accounts, contacts, and leads to matching Twitter profiles. Users can see Twitter user profiles and people in common in Salesforce and quickly access tweets.

#### **Shared Activities**

Represent activity relationships more accurately by letting your sales reps relate multiple contacts to individual events and tasks. Shared Activities is forever. After the feature's enabled, it can't be disabled.

### Set Up Users for Lightning Experience

Next up, make sure that the desired users get access to Lightning Experience. By default, the "Lightning Experience User" permission is automatically enabled for all users with a standard Salesforce profile. But you can fine-tune access to Lightning Experience with custom profiles or permission sets. Meaning you can do a limited rollout to a pilot group or enable a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. The power is yours.

Important: Okay, if you use Group Edition that's overstating things. It's not possible to remove the "Lightning Experience User" permission from your org's standard profiles and custom profiles aren't available. So it's "all or nothing" if you want to turn on Lightning Experience—all your users switch immediately to the new interface. Be sure to prepare your users for their new Salesforce experience and give them advance notice before you change to Lightning Experience. And remember, users who prefer to remain in Salesforce Classic can always switch themselves back via the Switcher.

First things first, do you have users with standard profiles who shouldn't get Lightning Experience yet? Move these users to custom profiles that don't include the "Lightning Experience User" permission.

# **EDITIONS**

Profiles and Permission Sets available in: both Salesforce Classic and Lightning Experience

Profiles available in: Professional, Enterprise, Performance, Unlimited, and **Developer** Editions

Permission Sets available in: Group, Professional, **Enterprise**, Performance, **Unlimited**, and **Developer Editions** 

For users with custom profiles, decide who gets Lightning Experience. Custom profiles don't automatically include the "Lightning Experience User" permission so it's up to you. Consider these options.

Want to test Lightning Experience with a small group of custom profile users but you don't want to turn it on for everyone assigned to these profiles? Create a permission set that includes the "Lightning Experience User" permission. Then apply the permission set to each pilot user. When you turn on Lightning Experience, only pilot users see the new interface.

Are you new to permission sets? Check out this walkthrough! Walk Through It: Create, Edit, and Assign a Permission Set



Interested in rolling out Lightning Experience to specific custom profiles? Or ready to enable all your custom profile users? Adding the "Lightning Experience User" permission to profiles is the fastest way to mass-enable the new user interface.

If you're dealing with many profiles, you can tackle them at the same time with the Data Loader. But remember, with great power comes great responsibility. Take care you don't inadvertently enable or disable other features.

If you're going to limit Lightning Experience to a subset of your users, we recommend that you keep all members of a functional team on the same experience. If you have team members who often share links and work closely together, include them all in your pilot. See Gotchas If Users Switch Between Lightning Experience and Salesforce Classic for more details.

#### SEE ALSO:

Salesforce Help: Profiles

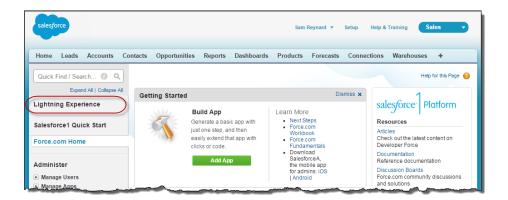
Salesforce Help: Permission Sets

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

### Turn on Lightning Experience for Your Org

You've knocked off the "Learn" and "Launch" items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users—and they're trained and expecting the exciting changes coming their way. You're ready to go live! Fortunately, it's easy to turn on Lightning Experience using the Migration Assistant.

From Setup in Salesforce Classic, click **Lightning Experience**.



### **EDITIONS**

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

### **USER PERMISSIONS**

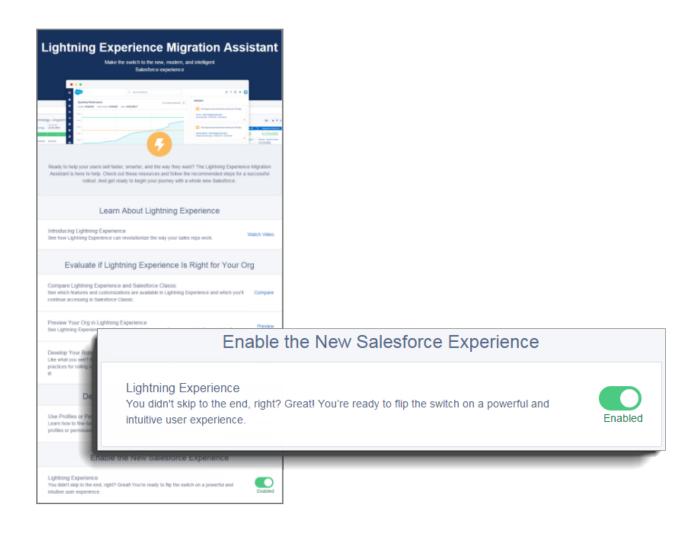
To view the Lightning Experience Migration Assistant:

 "View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:

"Customize Application"

On the Lightning Experience Migration Assistant page, click the **Lightning Experience** button to set it to **Enable**.



That's it! The users you've enabled automatically start enjoying Lightning Experience when their current session refreshes or when they log in.

# Find Your Way Around Lightning Experience

Feeling a little discombobulated by all the Lightning Experience newness? Perfectly understandable. Diving in to a redesigned app can be disorienting—especially when you're able to work in the original interface with your eyes closed. To hone your Lightning Experience chops, let's look at where some of the most common Salesforce features landed in the new interface.

# EDITIONS

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

#### IN THIS SECTION:

#### Find Profile and Personal Settings in Lightning Experience

In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to both of these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You'll find links for that, too.

#### Find Your Stuff in Lightning Experience

In Salesforce Classic, you use tabs to access objects, like accounts and leads. Tabs also serve up other features, such as your Home page or Chatter. Lightning Experience replaces the tab bar with a collapsible navigation menu that includes objects, apps, and other goodies. Looking for connected apps? If an item isn't in the navigation menu, look in the App Launcher.

#### Find List Views in Lightning Experience

Lightning Experience improves the Salesforce Classic list view experience with a more intuitive layout, convenient navigation, and seamless list creation and editing.

#### Find Your Way Around Records in Lightning Experience

In Salesforce Classic, record details, related lists, and the record feed display on the same page. This layout can lead to a lot of scrolling, especially in records with a lot of data. In Lightning Experience, find record details, related information, and the record feed in dedicated tabs that are easy to switch between.

#### Find Actions and Buttons in Lightning Experience

While Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page, Lightning Experience blurs the distinction between these elements. The new interface intermingles actions and buttons, locating them in different areas, based on function.

#### Find Related Lists in Lightning Experience

Records in Salesforce include details and links to other related records. Salesforce Classic displays related records in lists that appear near the bottom of the page. In Lightning Experience, related information appears in related list cards. For leads and opportunities—the objects that include a workspace—access related list cards from the Related tab. For reference objects like accounts and contacts, and on groups and people, related list cards display on the right side of the page.

#### Find Chatter Features in Lightning Experience

With Lightning Experience, you can connect with people and groups and share business information securely and in real time, just like you're used to in Salesforce Classic. The way you access Chatter feeds, groups, and profiles is a bit different in the new interface. But with this quick overview, you'll feel right at home.

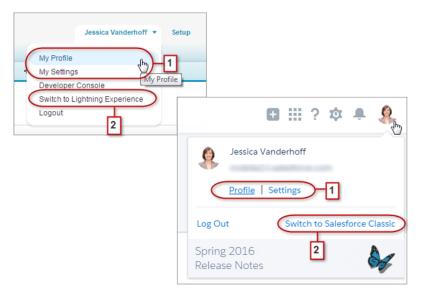
#### Find Help in Lightning Experience

Help is here! And it's better than ever in Lightning Experience, where the contextual Help menu serves up targeted content like videos, walkthroughs, help topics, and trails. Bonanza!

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In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to both of these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You'll find links for that, too.

EDITIONS



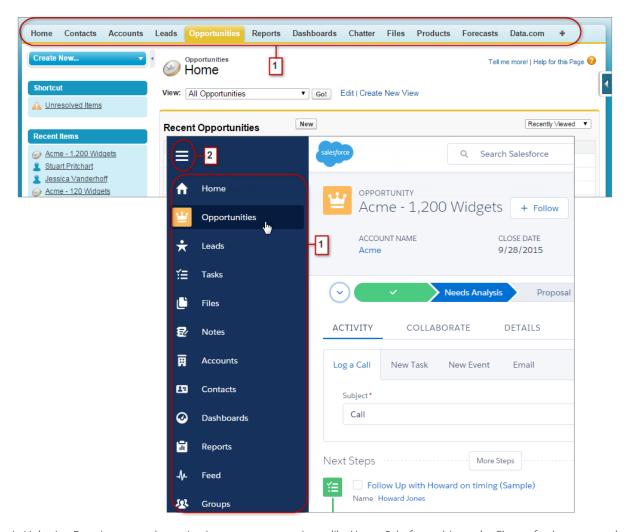
In Lightning Experience, click your profile picture to find links to your profile and personal settings (1). By the way, before you add a

photo, you look like this: . That's probably not a great likeness, so click **Profile** to add a photo and become human! If you need to head back to Salesforce Classic, use the Switcher (2). We remember your choice and set it as the default. Want to switch back to Lightning Experience? Just click your name in the Salesforce Classic header, then click the Switcher (2).

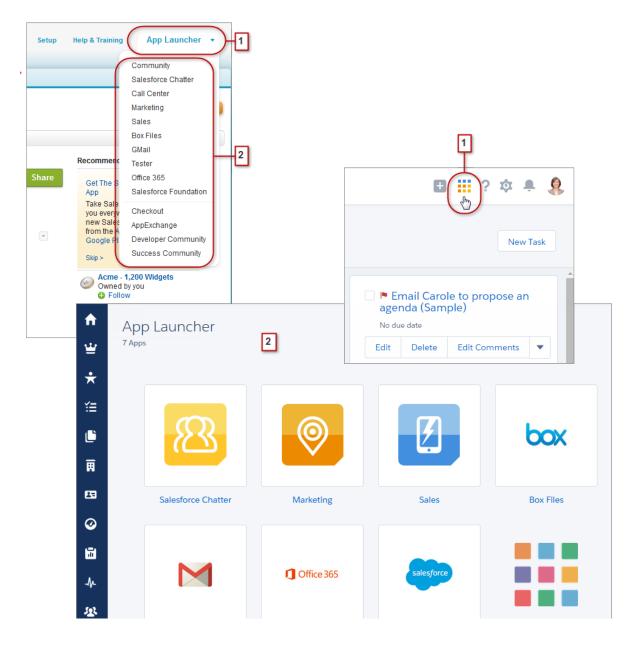
# Find Your Stuff in Lightning Experience

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# EDITIONS



In Lightning Experience, use the navigation menu to access items like Home, Salesforce objects, the Chatter feed, groups, and people, dashboards and reports, productivity tools, and apps. Your org can use the default navigation menu or custom ones that are assigned to user profiles and give users just what they need. Simply click the icon for the item you want (1). Scroll down to see everything in the menu. Click the navigation menu icon (2) to expand the menu and show item names. Collapse it when you're familiar with the items' icons.



You use the App Launcher Force.com menu (1) in Salesforce Classic to access available apps. In Lightning Experience, hover over the App Launcher icon (1), watch it go all *rainbow*, then click to find your apps on the App Launcher page (2).

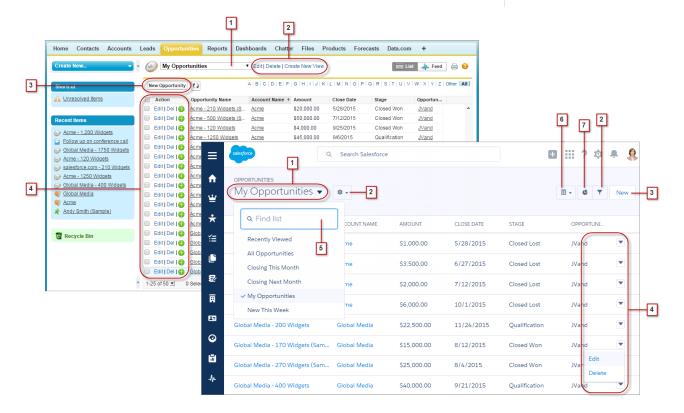
Looking for an item that's not in the navigation menu or not yet available in Lightning Experience? Click the tile for the feature's cloud, then scroll down for links to that feature. Clicking a link opens the feature in Salesforce Classic in a separate browser tab. For example, to use Collaborative Forecasts, click **Sales**, then scroll down for the **Forecasts** link. Click it to show the Forecasts tab in a separate browser tab in Salesforce Classic.

## Find List Views in Lightning Experience

Lightning Experience improves the Salesforce Classic list view experience with a more intuitive layout, convenient navigation, and seamless list creation and editing.

## EDITIONS

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



- Select a list view from the drop-down menu (1).
- Create, edit, or delete list views (2). Use 🝸 to quickly modify a view's filters and refine which records are displayed.
- Create records (3) directly from a list view.
- Edit or delete (4) specific records.

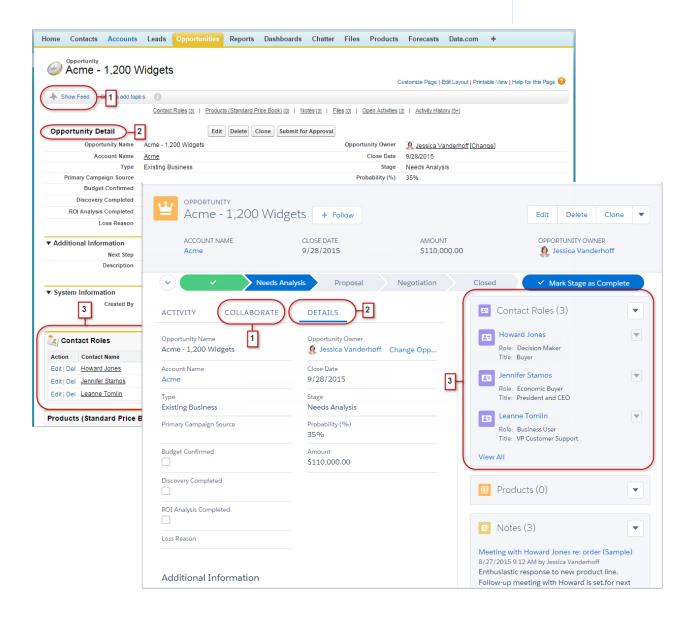
List views in Lightning Experience include several new features that aren't available in Salesforce Classic.

- Find a specific list view faster by searching for it (5).
- On opportunities only, toggle between the standard list view grid and the new Opportunity Board (6), a visual way to monitor the pipeline.
- Visualize list view data in one of several types of charts: vertical bar, horizontal bar, or donut (7).

# Find Your Way Around Records in Lightning Experience

In Salesforce Classic, record details, related lists, and the record feed display on the same page. This layout can lead to a lot of scrolling, especially in records with a lot of data. In Lightning Experience, find record details, related information, and the record feed in dedicated tabs that are easy to switch between

## **EDITIONS**



- In Salesforce Classic, Show Feed (1) controls whether a record's Chatter feed is visible. In Lightning Experience, the record's feed and the feed composer are always available on the Collaborate tab (1).
- See all record details on the Details tab (2).

• In Salesforce Classic, records include related lists (3), while Lightning Experience displays related information in related list cards (3). See Find Related Lists in Lightning Experience for a deeper examination of how related information is handled in the new and classic interfaces.

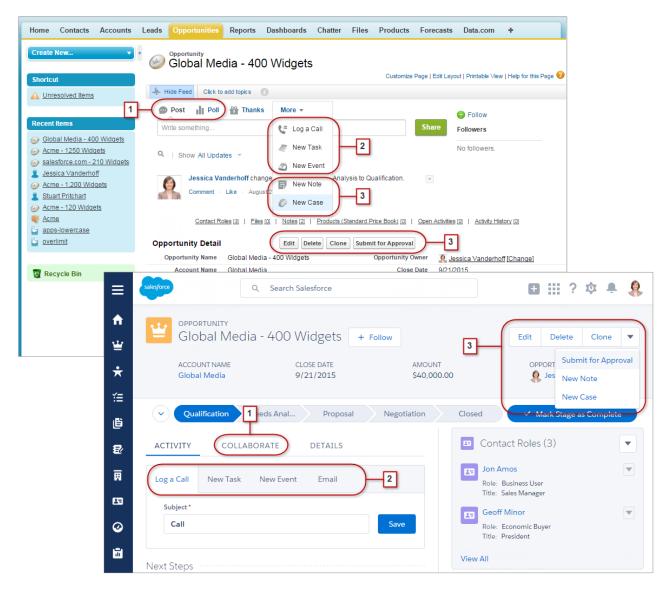
SEE ALSO:

Find Actions and Buttons in Lightning Experience

# Find Actions and Buttons in Lightning Experience

While Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page, Lightning Experience blurs the distinction between these elements. The new interface intermingles actions and buttons, locating them in different areas, based on function.

## **EDITIONS**



- The Post and Poll standard Chatter actions (1) appear in the composer on the Collaborate tab in Lightning Experience. Other standard actions like Thanks and Links, however, aren't available in the new interface.
- The Log a Call, New Task, and New Event actions (2) from an object's page layout appear in the composer on the Activity tab. And if the Send an Email button is included on the object's page layout, the Email action shows up in this composer too. These actions create records that are related to one the user is viewing.

Or use the Global Actions menu ( ) in the header to log a call or create events, notes, and tasks that aren't related to the current record.

• Standard and supported custom buttons (3) on the page layout—including the Edit button—appear in the action menu. And any other global and object-specific actions, including Visualforce and Force.com Canvas actions, appear in the menu as well.

• As in Salesforce Classic, custom links are included with the record's details. Click the Details tab to find them.

#### SEE ALSO:

Find Your Way Around Records in Lightning Experience

Salesforce Help: Actions in Lightning Experience

Salesforce Help: How Actions Are Ordered in Lightning Experience

Salesforce Help: Navigation and Actions: What's Not in Lightning Experience

## Find Related Lists in Lightning Experience

Records in Salesforce include details and links to other related records. Salesforce Classic displays related records in lists that appear near the bottom of the page. In Lightning Experience, related information appears in related list cards. For leads and opportunities—the objects that include a workspace—access related list cards from the Related tab. For reference objects like accounts and contacts, and on groups and people, related list cards display on the right side of the page.

# EDITIONS

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





For the first eight related list cards on a record:

• Related list buttons (1) are located in the upper-right corner of each related list card. If there are multiple buttons, use the pull-down menu to access them.

- Each item in a related list card includes a link (2) that opens the related record.
- Record-specific actions (3) are located in the pull-down menu next to each related record.
- When related list cards are on the right side of the page, each card displays up to three records. On reference objects, related list cards display up to six records. In both cases, drill down (4) to see the full list of related records.

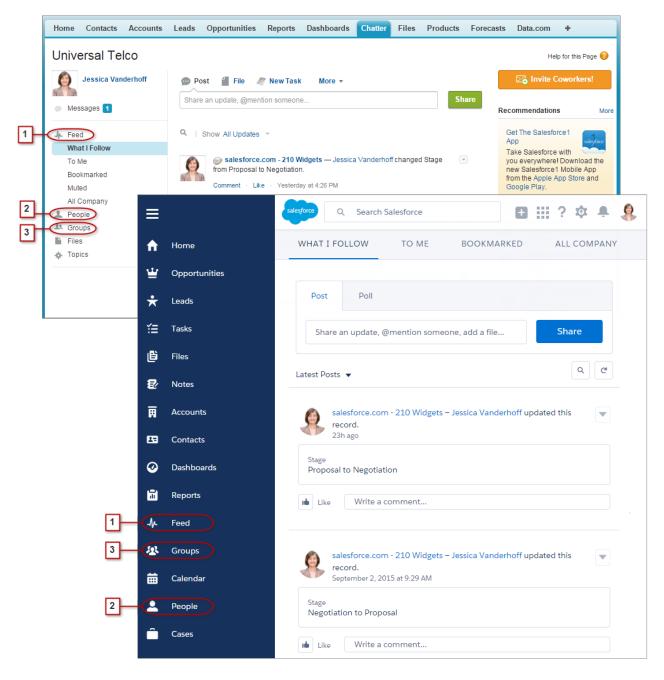
If there are more than eight related lists on a record, additional related list cards display the object's name only. Click the name in the related list card to open the full related list, which includes the related list buttons and record-specific actions that aren't included in the card.

## Find Chatter Features in Lightning Experience

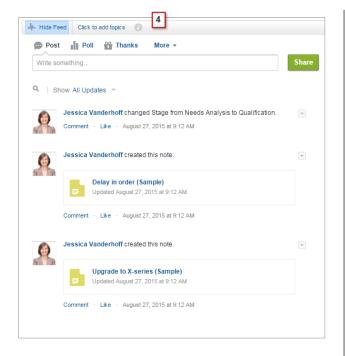
With Lightning Experience, you can connect with people and groups and share business information securely and in real time, just like you're used to in Salesforce Classic. The way you access Chatter feeds, groups, and profiles is a bit different in the new interface. But with this quick overview, you'll feel right at home.

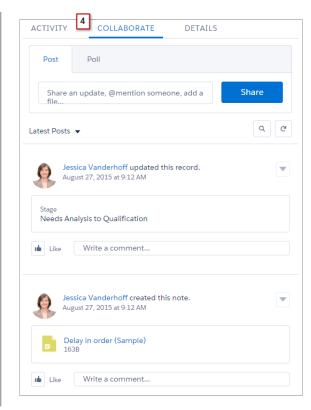
In Salesforce Classic, you typically access Chatter features from the sidebar on the Chatter tab. In Lightning Experience, access the main feed (1), colleagues' profiles (2), and groups (3) directly from the navigation menu.

## **EDITIONS**



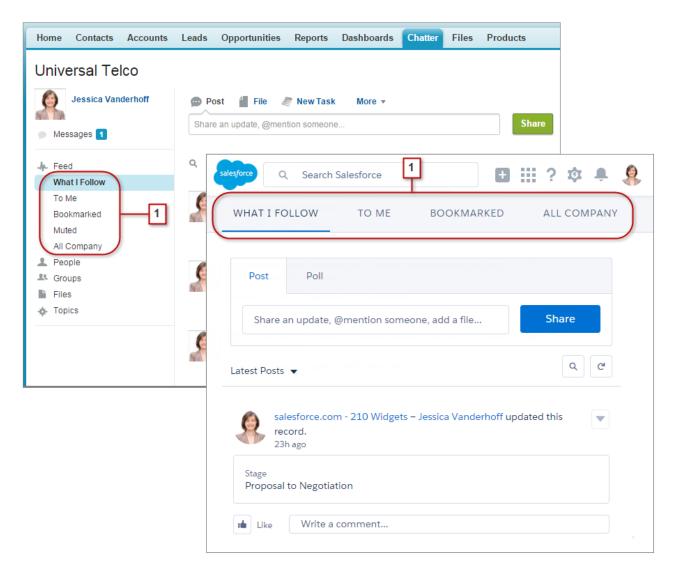
To collaborate on records (4), look for the Collaborate tab in Lightning Experience. You can post updates, create polls, and share files, just like in Salesforce Classic. But now there's no more fussing with the Hide Feed and Show Feed links.



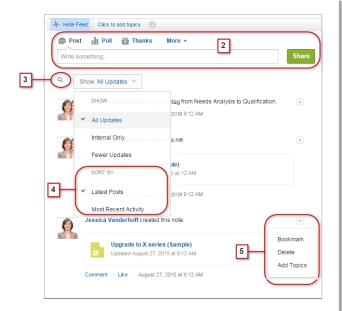


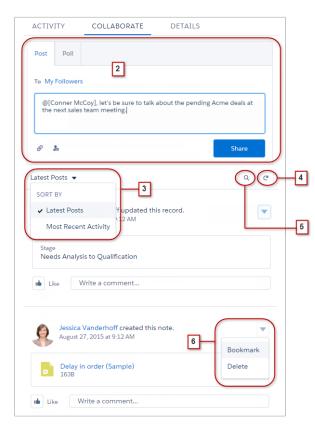
## Work with Feeds

You can change the main Chatter feed to show a particular subset of posts (1). In Lightning Experience, use the tabs at the top of the page. The What I Follow feed continues to be the default feed.



Feeds in Lightning Experience include many of the options that are available in Salesforce Classic.



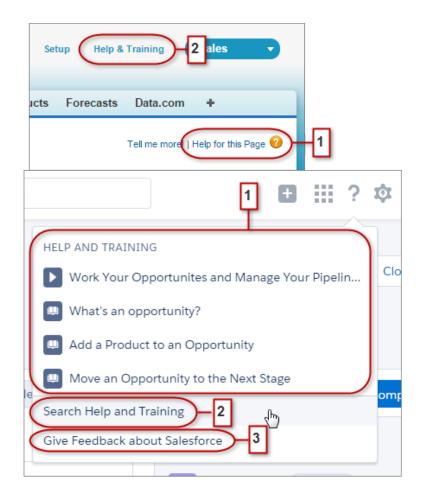


- The Post and Poll actions are available in the composer (2) on the Collaborate tab. Click the composer to access buttons for uploading a file or mentioning people. Other standard Chatter actions that appear in the publisher in Salesforce Classic, including Thanks and Links, aren't available in Lightning Experience.
- Sort the feed (3) by most recent posts or comments. Options to filter a feed aren't available in Lightning Experience.
- In Lightning Experience, refresh the feed (4) to see up to date information.
- Locate information in a specific feed with feed search (5).
- Acting on a post (6) is the same in both interfaces. But topics aren't available in Lightning Experience.

# Find Help in Lightning Experience

Help is here! And it's better than ever in Lightning Experience, where the contextual Help menu serves up targeted content like videos, walkthroughs, help topics, and trails. Bonanza!





In Salesforce Classic, most pages and related lists link to a single contextual help topic. With the Lightning Experience Help menu (1), we provide lots more options, with links to videos, walkthroughs, help topics, and trails—whatever is most relevant to what you're working on.

Both interfaces include links to the main Help & Training portal (2). But the link in Lightning Experience saves time, taking you right to the search page so that you can quickly find the help you need.

We need your feedback! Just click the Give Feedback link (3) to share your comments about Lightning Experience or anything else Salesforce. Thanks!

# **Lightning Experience Considerations**

This release of Lightning Experience doesn't include everything that's available in Salesforce Classic. Review these topics to see if any functionality that's critical to your business is limited or unavailable in this release. This information can also help you train users about what to expect when you do switch to Lightning Experience.

# EDITIONS

#### IN THIS SECTION:

#### Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic is fast and easy. But switching between interfaces affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. This means there can be snags with bookmarks and sharing links in emails or Chatter posts, especially if your organization has a subset of users authorized for Lightning Experience while others are still using Salesforce Classic.

#### What's Not Available in Spring '16 Lightning Experience Features

The Spring '16 release introduces many new and enhanced features for Lightning Experience. See which new features and enhancements don't have all the functionality that's available in Salesforce Classic, or that have some limitations this release. While reviewing this list, remember that your users can always switch to Salesforce Classic to access functionality that's not currently in the new user interface.

#### What to Expect in Lightning Experience When Chatter Is Turned Off

If your organization doesn't use Chatter, several aspects of the Lightning Experience interface aren't available. Learn how Lightning Experience changes, and see if you're losing functionality that you'd rather not live without.

## Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic is fast and easy. But switching between interfaces affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. This means there can be snags with bookmarks and sharing links in emails or Chatter posts, especially if your organization has a subset of users authorized for Lightning Experience while others are still using Salesforce Classic.

When users are first enabled for Lightning Experience, the new interface is their default, *preferred* experience. Every time a user switches interfaces via the Switcher, the user's default preference resets to the current environment. With this behavior in mind, here are the typical link routing interactions your users can encounter.



User Has the "Lightning Experience User" Permission?	User's Default Experience	Where Links Open
Yes	Lightning Experience	For pages supported in Lightning Experience, links open in the new interface (even for links generated in Salesforce Classic).
		Links to unsupported pages are directed to Salesforce Classic, which opens in a new tab. This temporary redirection doesn't change the user's default preference to Salesforce Classic. The nex time the user selects a link that is supported in the new interface the Salesforce Classic tab is reloaded to open the link in Lightning Experience.
Yes	Salesforce Classic	Links generally open in Salesforce Classic.
		If a link was generated in Lightning Experience (meaning it include /one/one.app in the URL), the link opens in Lightning Experience. The user's default preference doesn't change to Lightning Experience.

User Has the "Lightning Experience User" Permission?	User's Default Experience	Where Links Open
No	Salesforce Classic	Links open in Salesforce Classic only.  If a link was generated in Lightning Experience (meaning it includes /one/one.app in the URL), the link doesn't open, because the user can't access Lightning Experience.

Given these routing behaviors, you can see the potential for confusion if users share Lightning Experience links with Salesforce Classic users. To avoid this problem, we recommend enabling the new interface for all users who work closely together.

We also recommend training your Lightning Experience users to understand how links and bookmarks work across the two experiences.

#### SEE ALSO:

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

## What's Not Available in Spring '16 Lightning Experience Features

The Spring '16 release introduces many new and enhanced features for Lightning Experience. See which new features and enhancements don't have all the functionality that's available in Salesforce Classic, or that have some limitations this release. While reviewing this list, remember that your users can always switch to Salesforce Classic to access functionality that's not currently in the new user interface.



**Note**: To see the complete list of feature gaps and limitations in Lightning Experience, check out What's Not Available in Lightning Experience in the Salesforce Help.

# EDITIONS

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

#### IN THIS SECTION:

Data Access and Views: What's Not in Lightning Experience

Sales Features: What's Not in Lightning Experience

Productivity Features: What's Not in Lightning Experience

Customer Service Features: What's Not in Lightning Experience

Reports and Dashboards: What's Not in Lightning Experience

Files and Content: What's Not in Lightning Experience

Chatter: What's Not in Lightning Experience

Navigation and Actions: What's Not in Lightning Experience

Search: What's Not in Lightning Experience

Data.com: What's Not in Lightning Experience

Apps and Packaging: What's Not in Lightning Experience

#### SEE ALSO:

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

## Data Access and Views: What's Not in Lightning Experience

#### **List Views**

Here are some considerations when creating and editing list views in Lightning Experience.

- You don't go to a new page to create a list view. Instead, you stay on the same page and give the list view a name in a pop-up dialog box. You add filters to customize your list with a panel that slides out on the right side of the page.
- You can only restrict list views by selecting All or My. Other options, such as restricting by queue, campaign, or price book, aren't available.
- For filter criteria, only these relative date ranges are supported: Today, Tomorrow, Yesterday, This Week, This Month, This Quarter, This Year, Last Week, Last Month, Last Quarter, Last Year.
- List views in Lightning Experience don't support starts with as a filter criterion for ID fields. An ID field is a 15-character field that identifies a record. For example, the Account ID field on the contact object identifies which account a contact is associated with. You can use starts with as a filter criterion for other fields.

#### **Inline Editing**

Inline editing of fields on a record's Details tab is available in Lightning Experience. But it's not possible to edit individual fields in the Highlights panel on a record, or fields in list views.

## Sales Features: What's Not in Lightning Experience

#### Person Accounts (Beta)

- Person accounts aren't accessible from Setup. Switch to Salesforce Classic to set up and configure person accounts.
- Person accounts are included in all account and contact lookup results even when not applicable. For example, the account lookup field on a contact record includes person accounts even though person accounts can't be a contact's account.
- When hovering over a person account link, the quick view display differs based on where the person account link is. If the link
  is in the field that represents the contact (for example Name or Contact), then contact information is displayed. If the link is
  in the field that represents an account (for example Related To or Account), then person account information is displayed.
- The quick actions for business accounts are included on person account page layouts even though not all business account quick actions are valid for person accounts. For example, person account page layouts include the New Contact quick action even though contacts can't be associated with person accounts in this way.
- When person accounts are included in contact list views, row-level actions for accounts are displayed for person account records and row-level actions for contacts are displayed for contact records. Depending on how your org's sharing and visibility settings are configured, users might see different actions for person accounts and contacts in their contact list views.
- In some lookup fields, account or contact icons are shown instead of the person account icon.
- Communities created from a Community Builder—based template don't always properly link users to person account records.
   Specifically, when a user clicks a person account from a contact lookup field, they're redirected to a person contact record instead of a person account record.
- In contact lookup fields, person accounts don't appear in the list of most recent records. Person accounts do appear in lookup fields when they are searched. However, you must enter the full value of the person account's first name. Partial searches and wildcards aren't supported.
- When creating a case for a person account and users add the person account to either the Contact Name or Account Name field, the other field doesn't auto-populate with the person account until the case is saved.
- When creating an email from a person account record, the To field doesn't auto-populate with the person account's email address the way it does when creating an email from a contact record.
- When using a template to compose an email from a business account, the template could include person account merge fields, which prevents the email from being sent. Similarly, when using a template to compose an email from a person account, the template could include business account merge fields, which prevents the email from being sent.

• If using merge fields in an email to a person account, the contact merge fields don't show up in the merge field search results. Instead, contact merge fields must be entered manually.

#### Campaigns

- Campaign results across hierarchies
- Campaign Influence
- Cloning campaign members
- Adding multiple campaign members from list views

#### Leads

It's now possible to change a lead's owner to a queue. But all active queues are displayed, not just queues for leads.

#### **Opportunity Teams**

In Spring '16, Opportunity teams can be viewed, updated, or deleted in Lightning Experience, but switch back to Salesforce Classic to:

- Access setup pages for Opportunity Teams.
- Change the team member display order.
- Work with default opportunity teams.
- Mass assign or re-assign opportunity team members.
- Display access levels for all team members or delete all team members with a single button.
- Add multiple opportunity team members on a single page.

#### **Opportunity Products**

Opportunities with products can't be cloned.

### Productivity Features: What's Not in Lightning Experience

#### Home

Home shows upcoming events for the current day and includes a link to see all events scheduled for the day. But Home doesn't include a full calendar like is available on the Salesforce Classic home page. Instead, access the Calendar item from the navigation menu.

#### **Global Actions Menu**

The contents of the Global Actions menu in Lightning Experience is pulled from global actions in the Salesforce 1 and Lightning Experience Actions section on the global publisher layout. Currently, only actions with these action types are supported in this menu.

- Log a Call
- Create a Record—for events, notes, and tasks

Other global actions on the global publisher layout, including those that create records for custom objects or accounts or opportunities, don't appear in this menu.

#### **Integrated Email**

Integrated Email is fully supported for the Account, Campaign, Case, Contact, Leads, and Opportunity objects only, and not for custom objects. The Person account record type is partially supported: it does not offer Contact merge fields. From records for those objects, you can send email to contacts, leads, and users maintained in Salesforce, as well as to any valid external email address.

Fields available for templates are based on the object from which the template is created, plus user fields. For example, if you have an opportunity record open and create a template, you can add only Opportunity and User fields to your template. Similarly, email templates created for one object are not available for use from other objects. For example, templates created for use with the Lead object are not available for emails sent from opportunity records.

## Customer Service Features: What's Not in Lightning Experience

Learn about some new considerations when using Cases in Lightning Experience

#### **Close Case Layout**

For simplicity, the close case layout isn't available, but you can add closed statuses to case edit pages. From the Support Settings page in Setup, select Show Closed Statuses in Case Status Field.

#### **Case Assignment Rules**

Case assignment rules aren't supported; however, you can create similar rules with the Lightning Process Builder. If you select Case Assignment Checkbox on case page layouts, Assign using active assignment rules appears on cases, but it doesn't trigger assignment rules when it's selected.

#### Assets

Assets are supported in Lightning Experience. However, Assets aren't available in the Object Manager, and can't be added to custom navigation menus. You can access the assets object home from the App Launcher and individual asset records from the object home, search, and related lists.

### Reports and Dashboards: What's Not in Lightning Experience

#### **Object Support for Reports**

Even though Lightning Experience doesn't support all of the standard Salesforce objects yet, the Report Builder in Lightning Experience does. Users can create and view reports for all standard objects. Reports related to objects not yet supported in Lightning Experience open directly in the new interface and behave like any other report.

#### Filtered Dashboards

Users can't create, edit, or delete filtered dashboards, or add, change, or remove dashboard filters in Lightning Experience. However, users can view filtered dashboards. Filtered dashboards always open with no filters applied. It's possible to apply or clear filters that were added in Salesforce Classic.

#### **Table Charts**

To create table charts, users must switch to Salesforce Classic. Table charts display in Lightning Experience, but they don't show totals.

#### **Funnel Charts**

Funnel charts from Salesforce Classic display correctly on reports. But they display as bar charts on dashboards.

#### Files and Content: What's Not in Lightning Experience

#### File Syncing

File syncing isn't available in Lightning Experience. But Files home includes a Synced filter, so users can easily access any files they synced in Salesforce Classic.

#### Salesforce CRM Content

You can't create or manage libraries in Lightning Experience, but files that are in libraries are available in the new interface. Files in libraries are available from Files home, and users can share them and interact with them just as with Salesforce Files. Users can browse any libraries they have access to, and access the files that are in them from a filtered view on Files home.

#### **Files Connect**

Users can't browse content in external data sources from Files home in Lightning Experience, but they can do so when selecting files to attach to feed posts. Users can also access external file references that were created in Salesforce Classic.

## Chatter: What's Not in Lightning Experience

#### **Approvals in Chatter**

Lightning Experience users can't see approval requests in Chatter or in the activity timeline on records. To see the complete list of requests that are waiting for a user's approval, the user must switch to Salesforce Classic (or use the Salesforce 1 mobile app).

#### **People and Profiles**

Users with Chatter External licenses can't edit their profiles.

## Navigation and Actions: What's Not in Lightning Experience

#### Lightning Experience Navigation Menu Replaces the Tab Bar

The concept of tabs that represent objects doesn't exist in Lightning Experience. The new interface updates the old Salesforce Classic tab bar with a collapsible navigation menu that's located along the left side of the page.

The default navigation menu provides access to the standard Salesforce objects that are available in Lightning Experience, as well as Home, Chatter items (the main feed, people, and groups), files, dashboards, reports, and the user's task list and calendar.

#### Apps and Custom Objects Available from the App Launcher

By default, apps (including Salesforce *tabset apps* and connected apps) and custom objects aren't included in the default Lightning Experience navigation menu. If your org uses the default navigation menu, users can access these items from the App Launcher, by clicking in the header. Custom objects appear in the list of **Other Items**.

Even though Lightning Experience doesn't use the Salesforce Classic tab paradigm, you still need to create custom object tabs to ensure that your custom objects are available in the new interface.

#### **Custom Lightning Experience Navigation Menus Support Most Apps and Objects**

You can create custom Lightning Experience navigation menus and assign them to user profiles, giving different types of users a navigation menu that's tailored to their business needs. With some exceptions, you can include many of the apps, objects, and other tabs (including Visualforce tabs and Lightning Component tabs) that appear in the Lightning Experience App Launcher.

You can include these Salesforce objects in custom navigation menus: Accounts, Assets, Campaigns, Cases, Contacts, Files, Dashboards, Events, Knowledge Articles, Leads, Opportunities, Price Books, Products, Reports, Tasks, Tenants, Work Orders, and your custom objects. You can also add Home, the main Chatter feed, Groups, and People.

In this release, you can't include these items in custom Lightning Experience navigation menus:

- Connected apps, such as Gmail<sup>™</sup>, Microsoft Office 365<sup>™</sup>, and other apps from Salesforce ISVs
- Lightning Page tabs

Users can continue to access these items from the App Launcher.

There's no connection between the Lightning Experience and Salesforce1 navigation menus. Changes that you make to the Salesforce1 navigation menu have no impact on the default or custom Lightning Experience navigation menus, and vice versa.

#### **Open Links in New Browser Windows or Tabs**

In general, Lightning Experience supports right-click and Windows or Mac keyboard shortcuts to open links in new browser windows or tabs. However, these options aren't supported in some areas of the app, including:

- Links in the Top Deals and Recent Records cards on Home
- Action icons, buttons, and menu items on records
- Links to Notes
- View Report links on dashboards
- Links on Setup pages in Lightning Experience

Shortcuts do work to open nodes from the Setup menu into a new tab or window. However, the Schema Builder and Data Import nodes open in Salesforce Classic instead of in Lightning Experience.

## Search: What's Not in Lightning Experience

#### **Searchable Objects**

Only the following objects can be found in search results: accounts, assets, attachments, campaigns, cases, Chatter feed, Chatter groups, contacts, custom objects, dashboards, documents, files, leads, notes, opportunities, people, person accounts, price books, products, reports, work orders, and work order line item. Task and event items aren't searchable.

#### Search Results Can't Be Filtered

The "exact phrase" and "limit to items I own" filter options aren't available on search results pages. In addition, you can't filter search results. Sorting is available, except for Chatter groups and files. If a text field in the search results is too long for the column width, you can't see the full text in the search results. You can't expand the column widths.

For lookups, user-defined lookup filter fields and admin-defined dependent lookup filters aren't supported.

#### **Currency Values in Search Results Aren't Formatted**

For example, \$1,000.00 appears as USD1000.

#### **Dependent Lookup Filters Not Supported**

Admins can't set filters for lookups that reference fields on the current object record (the source). For example: configure the case Contact field to only show contacts associated with the account selected in the case Account Name field on the same record. However, related lookup filters, which restrict the valid values and search results, are supported. For example, configure the Account Owner lookup field to only show active users on the same record.

#### New Button in Lookup Dialog Search Doesn't Support All Objects

In Lightning Experience, you can create these objects from lookup dialog search windows: accounts, cases, contacts, custom objects, events, leads, notes, opportunities, price books, products, and tasks. For other objects, create the desired object or record before using the lookup dialog search to associate records.

## Data.com: What's Not in Lightning Experience

#### **Data.com Prospector**

Lightning Experience users can only prospect for:

- Contacts at accounts that are already in Salesforce
- Companies within the same corporate hierarchy as an account that's already in Salesforce

#### Data.com Clean

In Lightning Experience, customers can only review the Clean Status field for a record, review the status of the Company Info for Leads clean rule, and find out well the Company Info for Leads clean rule is working.

#### **Data.com Social Key**

This feature isn't available in Lightning Experience.

## Apps and Packaging: What's Not in Lightning Experience

#### **ISVforce Apps**

With Spring '16, you can use the License Management App to manage licenses and support subscribers in Lightning Experience. You can also use the Environment Hub to create and manage your development, testing, and trial orgs in Lightning Experience.

These ISVforce features remain unsupported in Lightning Experience:

- Channel Order App
- Trialforce
- Usage Metrics Visualization App

## What to Expect in Lightning Experience When Chatter Is Turned Off

If your organization doesn't use Chatter, several aspects of the Lightning Experience interface aren't available. Learn how Lightning Experience changes, and see if you're losing functionality that you'd rather not live without.

If you turn off Chatter for your entire organization or for a subset of users via permission sets:

- Feeds and groups aren't available.
- User profiles are still available, but feeds and groups aren't available on profiles.
- The Collaboration tab isn't available on records.
- Users can't follow records or other users.

## **EDITIONS**

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

# Financial Services Cloud: The Platform for High-Touch Relationship Management (Generally Available)

Today's digitally connected investors expect personalized outreach, proactive insights, and goals-based advice from their financial advisors. Salesforce Financial Services Cloud delivers the technology to accelerate your advisors' productivity, helping them engage with clients like never before and build deeper, lasting, more profitable relationships.

We've done the hard part. Your advisors get the tools that let them focus on high-value client activities instead of routine, administrative tasks. As an admin, you get the trusted power, security, and scalability of the Salesforce platform—tailored for advisory firms to streamline implementation. Install the Financial Services Cloud managed package and the unmanaged extension package. Connect data from your portfolio management, financial planning, and other systems of record. And then configure the app to suit how your advisors like to work.

#### IN THIS SECTION:

#### Take Charge of the Day with the Home Page

The Home page gives advisors an instant view of their day, so they can prioritize for the most productive, proactive day possible. See which tasks need attention or delegation and what's left to do today.

#### Engage More Deeply Than Ever with Your Book of Business

Client and household list views give your advisors a powerful, easy way to engage with specific segments in their book of business. Generate filtered lists of clients and households based on age, birthdays, marketing segments, or other criteria.

#### Comprehensive Client and Household Profiles

Client and household profiles help your advisors prepare more thoroughly for client and prospect meetings. Get a rich, holistic picture of a client's financial past, present, and future, in a single view.

#### Know Where You Stand with Dashboards

Packaged dashboards help your advisors monitor their engagements with existing clients, spot trends, and identify opportunities to bring in more business. You can customize these dashboards and create others using the underlying reports and custom report types provided in the extension package.

#### Platform Built on the Industries B2C Data Model

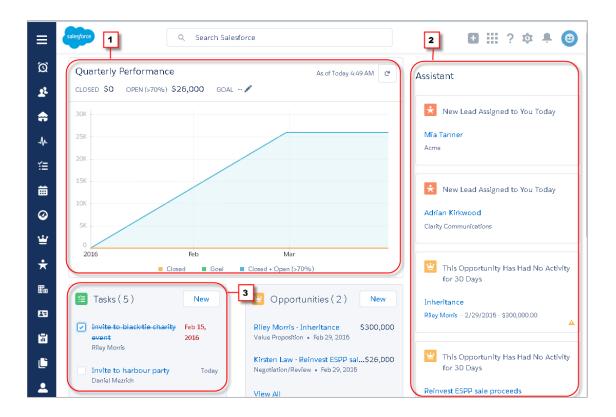
We've adapted the Salesforce data model to create a foundation for industries that require a structured, flexible B2C data model. It's built on top of the standard Account and Contact objects, extending these objects to represent an individual person, or client. It also lets us represent data about households, relationships between individuals and other entities, and clients' financials.

#### APIs for Integration

In API version 36.0, we enable you and the Salesforce partner ecosystem to further extend Financial Services Cloud. Access new custom fields and custom objects via the SOAP API. Use the new Industries REST API to access the unified object view of an individual person.

# Take Charge of the Day with the Home Page

The Home page gives advisors an instant view of their day, so they can prioritize for the most productive, proactive day possible. See which tasks need attention or delegation and what's left to do today.



- Use the quarterly performance dashboard (1) to see how opportunities are trending for the quarter.
- Check the Assistant (2) for proactive alerts about newly assigned leads and opportunities requiring attention.
- Stay on top of tasks with the Tasks component (3). Advisors can mark tasks complete right on the page.
- Keep open opportunities and leads top of mind, and create new records on the fly with the Opportunities and Leads components.

For now, the Home page layout isn't customizable.

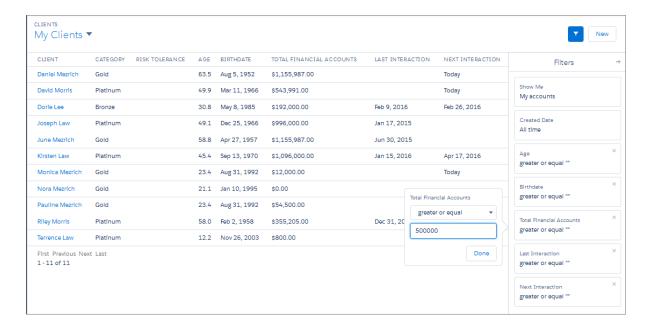
# Engage More Deeply Than Ever with Your Book of Business

Client and household list views give your advisors a powerful, easy way to engage with specific segments in their book of business. Generate filtered lists of clients and households based on age, birthdays, marketing segments, or other criteria.

Starting from the full clients or households list, advisors can view their entire book of business.



The default list views include predefined filters so that advisors can quickly drill in to create actionable lists. With just a few clicks, advisors can dynamically update the list with different filter criteria. For example, apply a filter to show only clients with financial accounts totaling at least \$500,000.



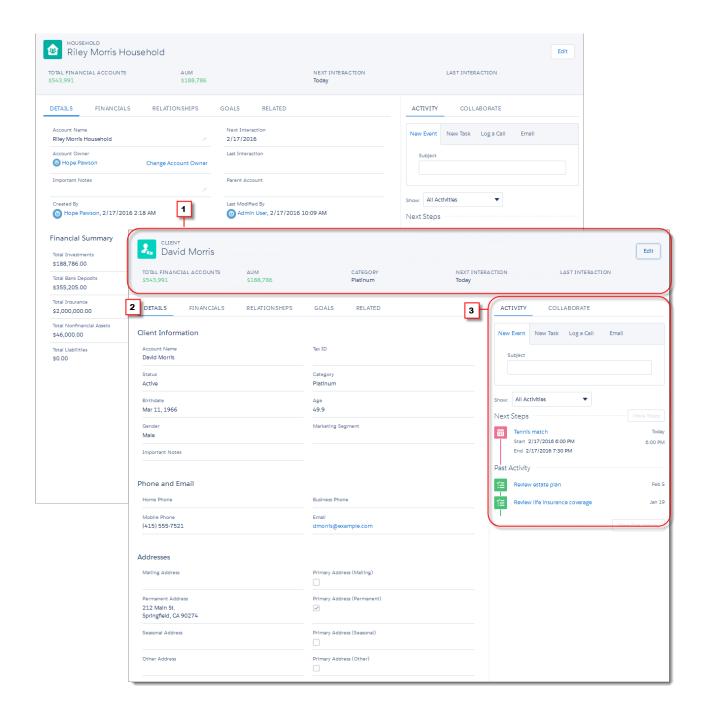
And voila! Just like that, we've got our filtered list of clients.



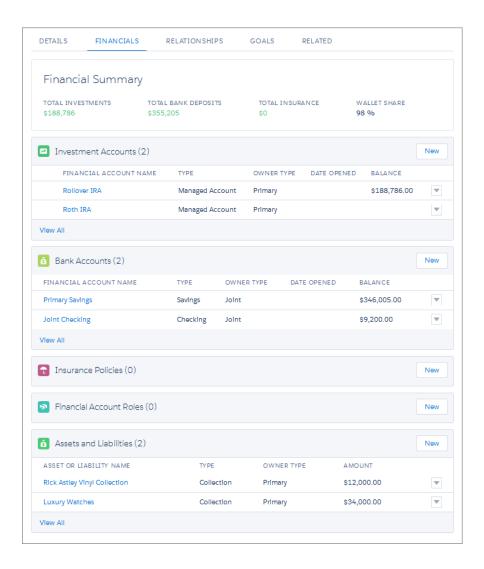
As an admin, you can customize the underlying reports and custom report types that determine the fields and criteria in the client and household list views.

# Comprehensive Client and Household Profiles

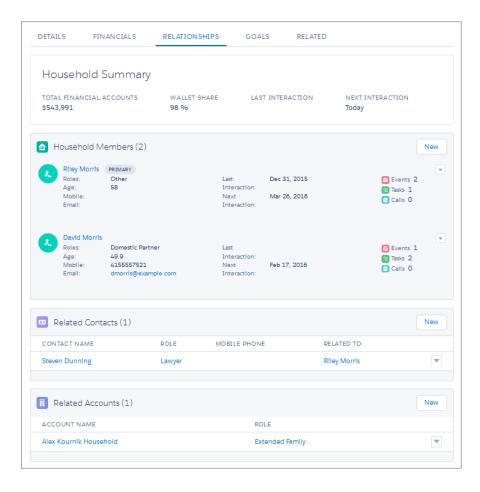
Client and household profiles help your advisors prepare more thoroughly for client and prospect meetings. Get a rich, holistic picture of a client's financial past, present, and future, in a single view.



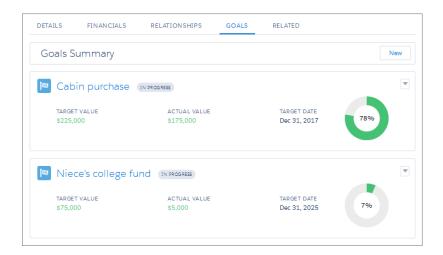
- The highlights panel (1) shows you the last and next scheduled interaction at a glance.
- The Details tab (2) provides easy access to client details such as Know Your Client, employment, and contact information, without having to leave the profile page. For households, get a high-level summary of total financial assets.
- The composer (3) lets you create tasks and events, and log client communications. Use the Chatter feed to share information and collaborate with other team members who manage the client relationship.



• The Financials tab tracks financial accounts, assets, and liabilities.



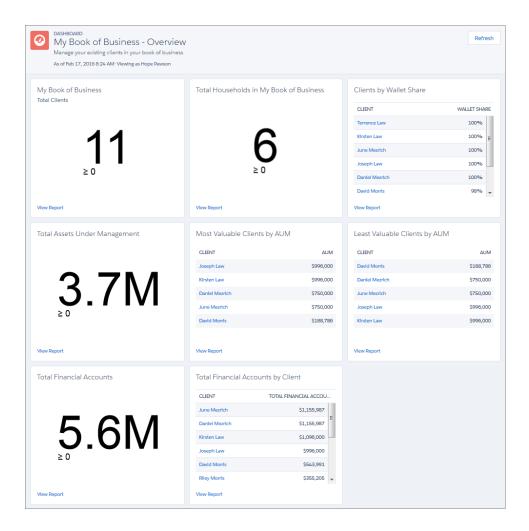
• The Relationships tab helps you manage household members' network of relationships. Add new household members. Keep track of the other professionals who advise clients about their financial lives. Track clients' affiliations with owned businesses and other organizational entities.



The Goals tab tracks what matters to you and your clients for goals-based planning.

# Know Where You Stand with Dashboards

Packaged dashboards help your advisors monitor their engagements with existing clients, spot trends, and identify opportunities to bring in more business. You can customize these dashboards and create others using the underlying reports and custom report types provided in the extension package.



#### My Book of Business - Overview

Manage your existing book of business with insights about AUM, wallet share, held-away assets, and financial account totals by client.

#### My Book of Business - Engagement Opportunities

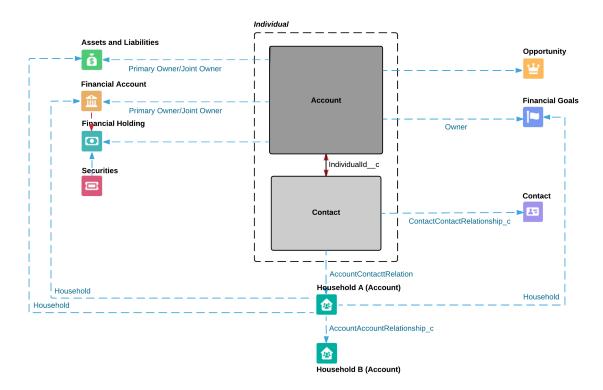
Deepen client relationships by tracking upcoming client reviews, birthdays, and other relationship touchpoints.

#### My Book of Business - Sales & Opportunities

Grow your book of business by identifying new AUM opportunities and focusing your sales process on hitting targets.

## Platform Built on the Industries B2C Data Model

We've adapted the Salesforce data model to create a foundation for industries that require a structured, flexible B2C data model. It's built on top of the standard Account and Contact objects, extending these objects to represent an individual person, or client. It also lets us represent data about households, relationships between individuals and other entities, and clients' financials.



We represent a client using a combination of the standard Account and Contact objects. They're coupled in what we call a *unified object* view of an individual person. We've extended these objects with custom fields, records types, and more.

We use custom objects to represent individual clients' financial accounts, the parties involved with their financial accounts, and other types of assets, liabilities, and financial goals. These objects are related to the account part of the individual.

A household represents a group of clients who live together and whose financials are summarized at the household level.

- A household is an account with the Household record type.
- The household is related to the contact part of an individual household member using the Account Contact Relationship standard object, which we've extended with custom fields.
- We can also relate household members to external accounts and contacts, using custom objects that represent relationships with other professional advisors, business entities, and other households.

# **APIs for Integration**

In API version 36.0, we enable you and the Salesforce partner ecosystem to further extend Financial Services Cloud. Access new custom fields and custom objects via the SOAP API. Use the new Industries REST API to access the unified object view of an individual person.

# Health Cloud: Deliver Collaborative, Connected Patient Care (Generally Available)

Delivering outstanding patient care means more than simply managing the information and events that involve patients. Health Cloud reinvents the way that care coordinators engage with patients.

The Health Cloud Console provides a consolidated view of critical patient records, access to the patient's care team, and the tools to bring it all together to improve healthcare outcomes. You create a strong, collaborative relationship with the patient and caregivers to assist the patient on a journey to better health.

Excellent care requires a complete picture of the data coming from electronic health record (EHR) systems to guide smart and efficient decisions regarding the patient. Salesforce Health Cloud, provides all the tools to help care coordinators manage patients with greater efficiency. The Health Cloud console includes:

# EDITIONS

Health Cloud is available in Salesforce Classic

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

- Comprehensive snapshots of vital patient data from EHRs
- Working view of a care coordinator's prioritized tasks related to patients
- Care timeline that shows a representation of patient history events, like appointments, prescriptions, conditions, and other care-related encounters
- Customized care plans that set measurable goals with tasks that can be assigned to the patient
- The What's Happening feed, powered by Salesforce Chatter, to keep care coordinators up-to-date with what's happening with patients and team members.

When you configure Salesforce Communities, you provide a private patient community that unites professional and personal caregivers in a collaborative network that drives care plan compliance. Coordinators can assign ownership of health tasks to members of the care team, including other health professionals, patients, and family members. They can exchange secure, private messaging with the patient and members of the community—and members can access those messages on any device.

#### IN THIS SECTION:

#### Size Up the Day with the Today Page

The Today home page gives care coordinators a clear picture of what each day looks like and keeps them ahead of the game.

#### Patient Card Provides a Comprehensive View of the Patient

The Patient Card extracts the most important information from a patient's medical records, such as conditions, medications, and contact information, and displays it all in one place. Care coordinators can easily see the information they need without searching for it or clicking to other pages.

#### Monitor the Timeline of Patient Medical Events

The patient timeline provides a snapshot of each patient's healthcare events and activities in chronological order. Since the information displayed in the timeline is interactive, coordinators can select any time scale and see all the important details of a patient's care or filter the events to see a targeted view

#### Care Plans Help Patients Reach Their Goals

It's never been easier for care coordinators to manage health problems with goals and tasks that they assign to patients or caregivers so that patients stay on track and improve their health. Easily manage health problems with goals and tasks that you assign to patients or caregivers so that patients stay on track and improve their health.

#### Collaborate with the Patient Care Team

The care team is the hub of each patient's private community—it represents everyone working to make sure that the patient succeeds with his or her care plan. It includes healthcare professionals from inside and outside of your organization, and family members of the patient.

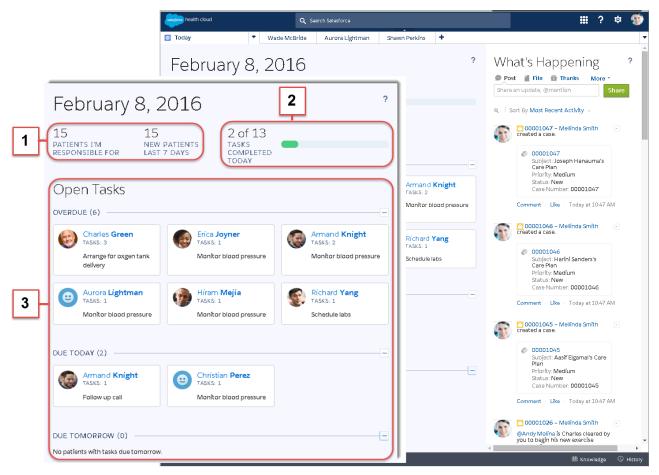
#### Create Health Cloud Patients

Patient creation includes two processes: a job flow that creates the patients and then a mapping group that maps data from the Candidate Patient object to other patient objects.

# Size Up the Day with the Today Page

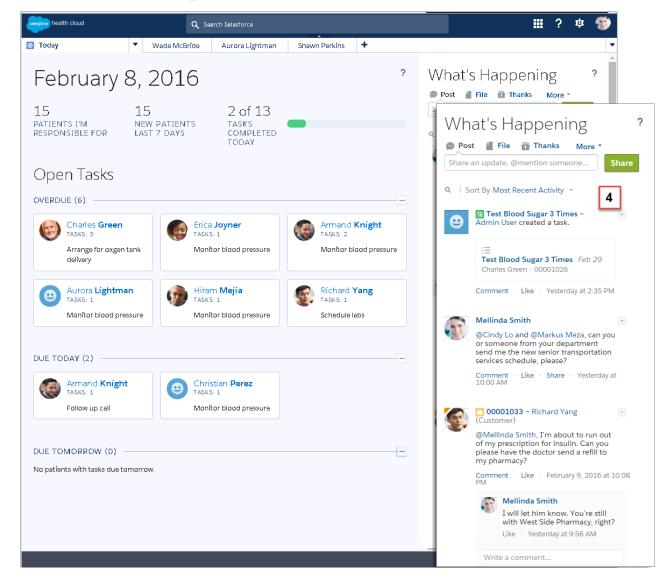
The Today home page gives care coordinators a clear picture of what each day looks like and keeps them ahead of the game.

Care coordinators can find the Today page by selecting it from the tab switcher in the Health Cloud - Console app. Coordinators can browse all the tasks they're tracking and keep current on conversations that are relevant to their patients and your company.



From the Today page in the console, coordinators can:

- See a quick summary (1) of how many patients are assigned to the coordinator and how many of them are new.
- Use the handy progress bar (2) to monitor progress toward completing the tasks that the coordinator oversees and manages.
- Browse tasks (3) that are related to specific patients to prioritize tasks and know which patients need some attention. Each tile shows
  the name of the patient along with the number of tasks associated with the care plan. Click the tile to bring up the patient overview
  and review and update tasks.



You can also check out this video: Manage Your Day with the Today Page

The What's Happening feed **(4)**, powered by Salesforce Chatter, keeps coordinators up-to-date with what's happening with their patients and team members. It's a secure, centralized place to review and participate in all the conversations that are important to managing patients. The feed shows messages between a coordinator and the patient, conversations with care providers from within the organization, and events or company announcements.

You can also check out this video: • Collaborate with Patients and Colleagues Using Chatter

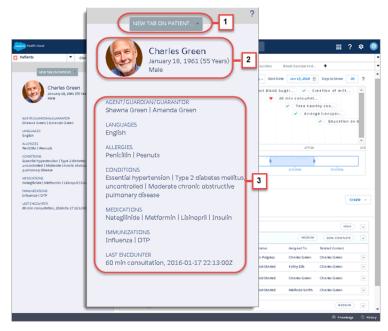
#### SEE ALSO:

Salesforce Help: See What's in Store with the Today Page Salesforce Help: Use Chatter to Find Out What's Happening

# Patient Card Provides a Comprehensive View of the Patient

The Patient Card extracts the most important information from a patient's medical records, such as conditions, medications, and contact information, and displays it all in one place. Care coordinators can easily see the information they need without searching for it or clicking to other pages.

As an admin, you can add fields to the patient card and provide care coordinators with the details they need about a patient's contact information, conditions, prescriptions, appointments, and medical history.



The patient card is made up of three different components:

- The patient card navigation menu (1) that lets care coordinators navigate to the pages they need without leaving the patient card.
   You can customize the items that appear in the tab navigation list on the patient card using custom settings. So you can add a new navigation item to one of the default menu categories, or you can add a category with new child navigation options to what you already have.
- The patient card header (2) that provides basic information on the patient as well as a thumbnail photo, if available. Fields from the patient card header aren't available for editing or other customizations.
- Patient contact and medical record fields (3) that you can add to the patient card. You can customize the patient card and add fields
  from the source record system so that care coordinators have the information they need to manage patients.

You can also check out this video: Get a Comprehensive View of Your Patient's Medical Records

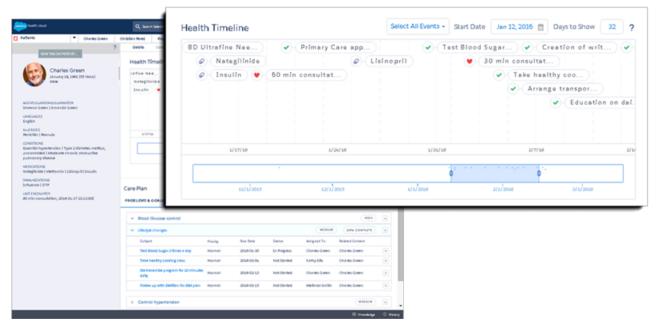
SEE ALSO:

Salesforce Help: Use the Patient Card for a Comprehensive View of Your Patient

# Monitor the Timeline of Patient Medical Events

The patient timeline provides a snapshot of each patient's healthcare events and activities in chronological order. Since the information displayed in the timeline is interactive, coordinators can select any time scale and see all the important details of a patient's care or filter the events to see a targeted view

You can add or remove healthcare events from the timeline view to provide your care coordinators with precisely the information they need to be more effective in managing their patients. On the Timeline View Configurations tab, add different events to the timeline by exposing fields on custom or standard object, and then selecting icons to represent the data on the timeline.



You can also check out this video: • Use the Timeline to Monitor Patient Health History

SEE ALSO:

Salesforce Help: Monitor the Timeline of a Patient's Medical Events

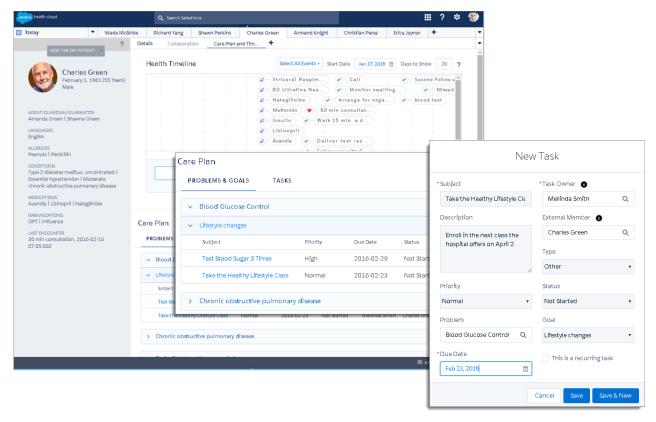
# Care Plans Help Patients Reach Their Goals

It's never been easier for care coordinators to manage health problems with goals and tasks that they assign to patients or caregivers so that patients stay on track and improve their health. Easily manage health problems with goals and tasks that you assign to patients or caregivers so that patients stay on track and improve their health.

A care plan can have any number of problems with associated goals and tasks and track their progress to completion from the patient's tab in the console. Problems are listed based on their importance, with higher priority items listed first.

Customize the fields that show up on the pages care coordinators use to create problems and goals for the care plan. Problems and Goals are both custom objects, and you can add custom groupings of fields by using Salesforce field sets. With fields sets, you can add custom fields or change the order of existing fields on the pages used to create problems and goals.

Customize the picklist fields on the New Task page so that the field values reflect the kinds of tasks care coordinators most often assign, and use rating terminology specific to your organization.



You can also check out this video: Use Care Plans to Help Patients Reach Their Goals

SEE ALSO:

Salesforce Help: Create a Patient Care Plan

# Collaborate with the Patient Care Team

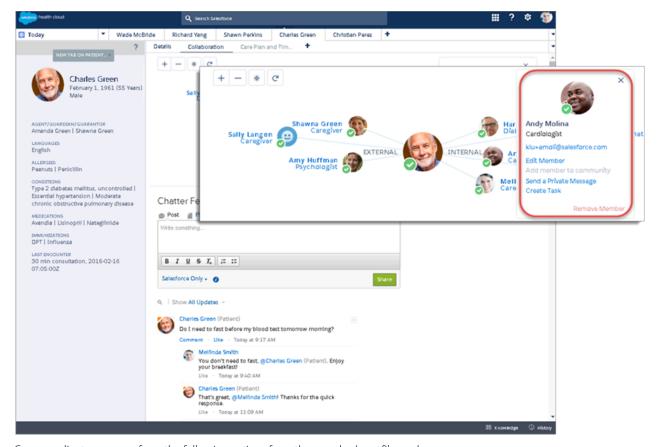
The care team is the hub of each patient's private community—it represents everyone working to make sure that the patient succeeds with his or her care plan. It includes healthcare professionals from inside and outside of your organization, and family members of the patient.



**Note:** Salesforce Communities provides the collaboration support for Health Cloud. Some of the collaborative features aren't available until you enable Salesforce Communities and create a private patient community

Care team member roles define the access that members have to information in the care plan. Every member has a unique role to play in caring for the patient, such as primary care physician, caregiver, or Case Manager. Roles determine access to patient information, like read only or read/write access. At a minimum, set up two roles: one for care coordinators and one for patients.

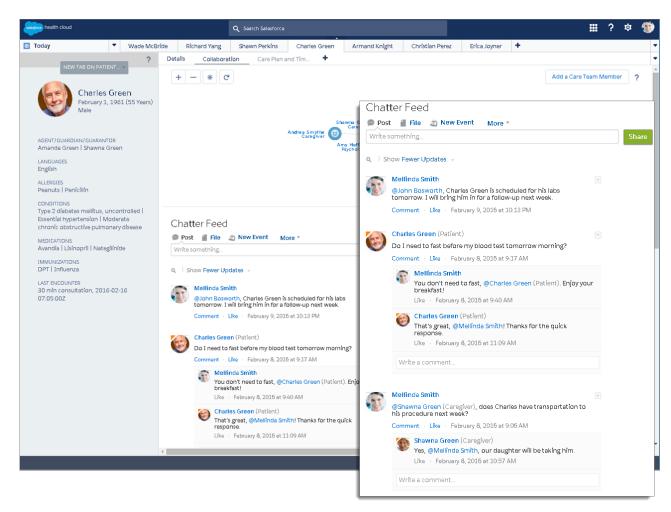
Click a care team member's profile picture in the care team view to see quick view options for interacting with that person.



Care coordinators can perform the following actions from the member's profile card:

- Send an email.
- Edit a member's record.
- Add the member to the community.
- Call the member on the phone. (Reserved for future use.)
- Send a private message.
- Create a task for the member.
- Remove a member from the care team.

The Chatter Feed on the Collaboration tab shows all the conversations with care team community members and activities related to the care plan. The Chatter feed on the Collaboration tab is a more focused version of the What's Happening feed on the Today page. Chatter feeds show posts and comments the care team makes, as well as record updates that are associated with the care plan. This feed is private to the care team community and only shows posts from members with access to the community. Posts from the care team do appear in the care coordinator's What's Happening feed on the Today page, but aren't seen by internal company users or users who aren't members of the care team community.



You can also check out this video: Manage the Patient Care Team

#### SEE ALSO:

Salesforce Help: Manage the Extended Care Team

Salesforce Help: Use the Chatter Feed to Collaborate with the Care Team

# Create Health Cloud Patients

Patient creation includes two processes: a job flow that creates the patients and then a mapping group that maps data from the Candidate Patient object to other patient objects.

The settings that control these processes are available for customization so that you can control how patient creation and data mapping occur in your org. Using custom metadata, you can change configuration values for:

- Processes like the job flow that creates patients.
- Rules that determine which fields from the Candidate Patient object get mapped to patient objects like Account, Contact, and Case.
- The job flows that execute in the patient creation process.

# EDITIONS

Health Cloud is available in Salesforce Classic

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

Once patient records are brought into Salesforce from the integration with the EHR system, care coordinators select names of candidate patients to convert into a Health Cloud patient. When coordinators select a patient name from the EHR system, Salesforce creates all the records and objects necessary to start managing that patient. So for each patient, Salesforce performs the following actions:

- Creates the patient as an individual, based on the fields you've mapped from the EHR system. An individual is an object view of both Account and Contact linked by the Individual ID.
- Creates an account for the individual that is linked to the patient ID/MRN field.
- Creates a contact record for the individual that is linked to the account through the Individual ID.
- Creates a case with a CarePlan record type so that the page layout for the care plan appears automatically. If a care coordinator has been selected, the coordinator becomes the owner of the case.
- Adds the case that represents the care plan to the account record.
- Creates a case team with the individual as the patient, and adds the care coordinator, if one has been selected.
- Adds the patient's account ID to the Candidate Patient record.

You can also check out this video: • Create Patients in the Health Cloud Console

SEE ALSO:

Salesforce Help: A Behind-the-Scenes Look at Patient Creation

# Sales: Opportunities, Campaigns, and More

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activities that need their attention. And help your sales teams increase their sales productivity in Lightning Experience.

#### IN THIS SECTION:

#### Core Sales Features: Help Reps Sell Using Lightning Experience

Give your sales reps access to better tools for selling.

#### Productivity Features: Help Sales Reps Do More with Lightning Experience

Get your reps to spend time wisely on the things that help them keep their deals moving along. Integrated email, an activity timeline, and a better experience with calendars and events help reps stay focused on the important things for closing deals fast.

#### Microsoft® Integration: Sync and Work Between Microsoft Email Systems and Salesforce

Get users syncing contacts, events, and tasks between Microsoft email systems and Salesforce, as well as working with Salesforce records directly in Outlook® and other Microsoft email apps.

#### Pardot: Make Lead and Contact Syncing Smarter

We've added several features that make syncing with Salesforce better than ever. Now you can control sync behavior for prospect fields, and intelligently merge and delete prospects when their Salesforce records are updated. We've also added the Engage side panel for Gmail, so your sales reps can view details about prospects and add them to nurture programs without leaving their email.

#### Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

# Core Sales Features: Help Reps Sell Using Lightning Experience

Give your sales reps access to better tools for selling.

#### IN THIS SECTION:

#### Accounts: Store Information About the People and Business You Work with in Lightning Experience

Person accounts are now available in Lightning Experience. Plus, we've made Account Insights even better with improved navigation and a new feedback option.

#### Forecasts: Use Collaborative Forecasts with Custom Fiscal Years

Businesses that use Custom Fiscal Years can now use Collaborative Forecasts. For companies that break down their fiscal years, quarters, and weeks into custom fiscal periods based on their financial planning requirements, Salesforce lets you to flexibly define these periods using custom fiscal years. Collaborative Forecasts can now calculate expected revenue for your custom fiscal periods or quarters.

#### Campaigns: Drum Up New and Repeat Business in Lightning Experience (Beta)

Generate and track outbound marketing campaigns that drive business to your company. Sales and marketing teams import campaign members, update their statuses, and see the impact that the campaigns have on related deals in the pipeline. This feature is available in both Lightning Experience and Salesforce Classic.

#### Opportunities: Track and Manage Your Deals in Lightning Experience

Opportunity team members are now available in Lightning Experience. Plus we've renamed the Opportunity Board to the Opportunity Kanban.

# Accounts: Store Information About the People and Business You Work with in Lightning Experience

Person accounts are now available in Lightning Experience. Plus, we've made Account Insights even better with improved navigation and a new feedback option.

#### IN THIS SECTION:

#### Person Accounts: Supported in Lightning Experience (Beta)

Person accounts take the standard business-to-business account model and extend it to include business-to-consumer sales, so you can capture information about individual people with whom you do business. With person accounts now available in Lightning Experience, Salesforce supports your sales process like never before. This feature is available in both Lightning Experience and Salesforce Classic.

# EDITIONS

Business accounts available in: **All** Editions

Person accounts available in: Enterprise, Performance, Unlimited, and Developer Editions

#### Account Insights: Better Display and Navigation in Lightning Experience

We've made several improvements to how Account Insights displays news, so your users can get instant access to even more relevant, more timely news than ever before. This feature is available in Lightning Experience only.

#### Account Insights: Improve the Relevancy of News in Lightning Experience

When viewing insights, users can provide feedback to Salesforce to help improve the relevancy and appropriateness of what's included. This feature is available in Lightning Experience only.

## Person Accounts: Supported in Lightning Experience (Beta)

Person accounts take the standard business-to-business account model and extend it to include business-to-consumer sales, so you can capture information about individual people with whom you do business. With person accounts now available in Lightning Experience, Salesforce supports your sales process like never before. This feature is available in both Lightning Experience and Salesforce Classic.



**Note**: This release contains a beta version of person accounts in Lightning Experience, which means it's a high-quality feature with known limitations.

Because person accounts store information you'd typically save for business contacts, such as first name and last name, you can usually treat a person account like a contact. For example, send an email to a person account or assign a person account to a task. But person accounts can sometimes work like business accounts. For example, you can add opportunities to person accounts. The unique person account icon is your cue that the record is neither an account nor a contact—it's much more. It's a person account.



For more information about setting up person accounts, see "Enable Person Accounts" in the Salesforce Help. To learn about how person accounts work with other Salesforce features, see "Person Account Behaviors" in the Salesforce Help.



**Important**: If you used person accounts in your org before Spring '16, you couldn't enable Lightning Experience in production. But the wait is over! You can enable Lightning within 24 hours after the Spring '16 release.

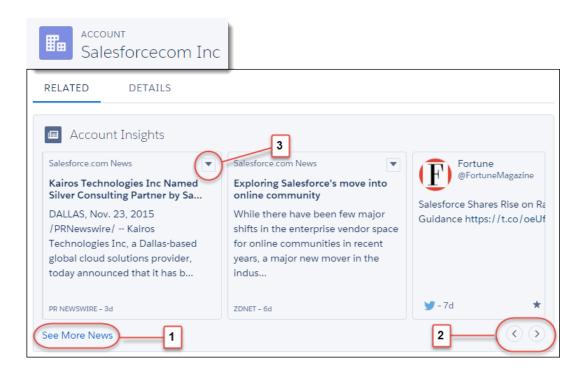
#### SEE ALSO:

Sales Features: What's Not in Lightning Experience *Idea Exchange*: Make Person Accounts Compatible with Lightning

## Account Insights: Better Display and Navigation in Lightning Experience

We've made several improvements to how Account Insights displays news, so your users can get instant access to even more relevant, more timely news than ever before. This feature is available in Lightning Experience only.

The **View All** button, which lets users see up to 20 insights on a single page, has been changed to **See More News** (1). We've also added the ability to scroll through the insights without leaving the account page (2). Finally, your users can provide feedback on individual insights to improve the relevancy of insights (3).



SEE ALSO:

Account Insights in Salesforce1

## Account Insights: Improve the Relevancy of News in Lightning Experience

When viewing insights, users can provide feedback to Salesforce to help improve the relevancy and appropriateness of what's included. This feature is available in Lightning Experience only.

Here are the feedback options.

#### **More Like This**

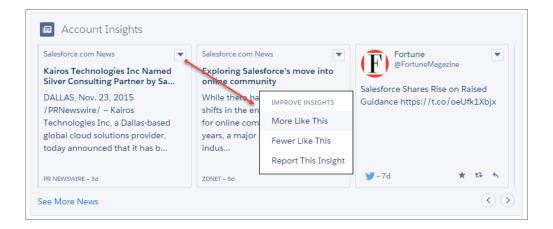
The insight is marked as relevant, and we'll include others like it in the future.

#### **Fewer Like This**

The insight is marked as irrelevant, and we'll avoid others like it in the future.

## **Report This Insight**

The insight is reported as inappropriate and removed from the user's view. When another user in the same org reports this insight, it's removed from view for all users in the org. When a user from a different org also reports this insight, it's removed from view from all orgs and is gone for good.



## Forecasts: Use Collaborative Forecasts with Custom Fiscal Years

Businesses that use Custom Fiscal Years can now use Collaborative Forecasts. For companies that break down their fiscal years, quarters, and weeks into custom fiscal periods based on their financial planning requirements, Salesforce lets you to flexibly define these periods using custom fiscal years. Collaborative Forecasts can now calculate expected revenue for your custom fiscal periods or quarters.

Not all businesses use the Gregorian year for their fiscal year. Salesforce makes it easy for you to define a custom fiscal year that fits your business needs. For example, as part of a custom fiscal year, you can create a 13-week quarter represented by three periods of 4, 4, and 5 weeks, rather than calendar months.

For more information about using custom fiscal years with Salesforce, see Fiscal Years.

Customers using Custom Fiscal Years, with or without Customizable Forecasting, can now begin using Collaborative Forecasts.

## **EDITIONS**

Collaborative Forecasts available in Salesforce Classic in: **Professional** (no Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Custom Fiscal Years available in Lightning Experience and Salesforce Classic in: **All** Editions except for **Database.com**.

# Campaigns: Drum Up New and Repeat Business in Lightning Experience (Beta)

Generate and track outbound marketing campaigns that drive business to your company. Sales and marketing teams import campaign members, update their statuses, and see the impact that the campaigns have on related deals in the pipeline. This feature is available in both Lightning Experience and Salesforce Classic.



**Note**: This release contains a beta version of campaigns in Lightning Experience, which means it's a high-quality feature with known limitations.

# **EDITIONS**

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

#### IN THIS SECTION:

#### Create Initiatives to Complement Sales Efforts

Get marketing and sales pros to track marketing initiatives in the campaigns your teams create directly in Lightning Experience.

#### Add Members to Marketing Campaigns in One Fell Swoop

Import leads and contacts in comma-separated values (CSV) files as campaign members for your marketing and sales pros.

#### Track Campaign Member Status

Get a sense of campaign member engagement through each member's status. Easily update status details using the import wizard.

#### See Campaign Membership for Leads, Contacts, and Person Accounts

Get your marketing and sales reps to see campaign participation—past and present—for their leads, contacts, and person accounts.

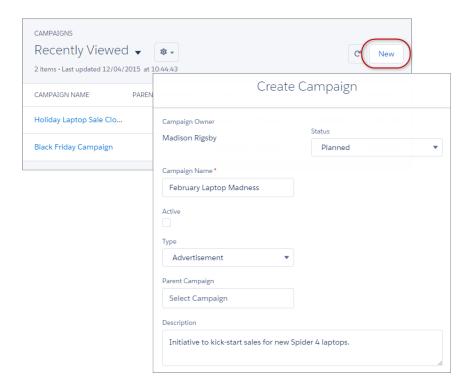
#### See a Campaign's Effect on Deals in the Pipeline

From a campaign, track ROI through related opportunities.

## Create Initiatives to Complement Sales Efforts

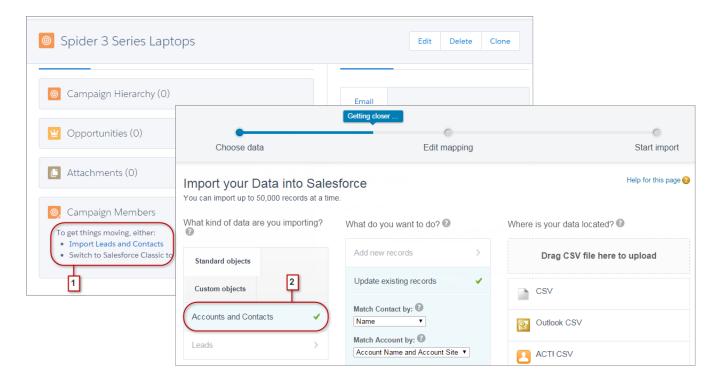
Get marketing and sales pros to track marketing initiatives in the campaigns your teams create directly in Lightning Experience.

It's easy for marketing and sales reps to create and track campaigns.



## Add Members to Marketing Campaigns in One Fell Swoop

Import leads and contacts in comma-separated values (CSV) files as campaign members for your marketing and sales pros.



If teammates don't yet have any campaign members (1), they can import a bunch of them at one time using the import wizard (2).

But if your reps want to hand-pick campaign members, they can add individual members from the contacts and leads records. Or, reps can switch to Salesforce Classic and add campaign members individually from saved list views.

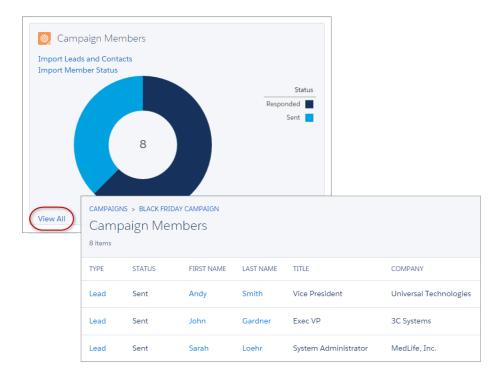
SEE ALSO:

Add and Update Campaign Members with the Data Import Wizard

## Track Campaign Member Status

Get a sense of campaign member engagement through each member's status. Easily update status details using the import wizard.

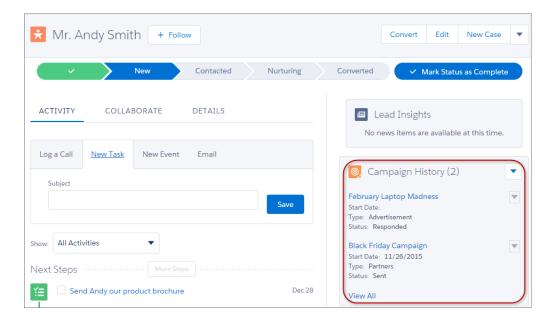
Here's your donut! It gives your marketing and sales teammates a visual sense of response rates for their campaigns. Teammates can also update the status for lots of campaign members using the import wizard.



See a list of campaign members with the **View All** link.

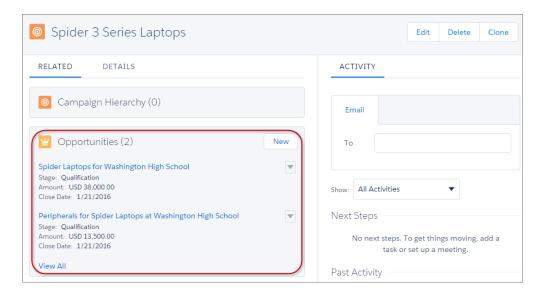
# See Campaign Membership for Leads, Contacts, and Person Accounts

Get your marketing and sales reps to see campaign participation—past and present—for their leads, contacts, and person accounts. From leads, contacts, and person accounts, see each record's campaign history.



## See a Campaign's Effect on Deals in the Pipeline

From a campaign, track ROI through related opportunities.



We see here that our campaign for Spider 3 laptops has already generated a couple of qualified opportunities.

# Opportunities: Track and Manage Your Deals in Lightning Experience

Opportunity team members are now available in Lightning Experience. Plus we've renamed the Opportunity Board to the Opportunity Kanban.



#### IN THIS SECTION:

#### Opportunity Board Is Now Opportunity Kanban

Opportunity Kanban visually summarizes all of the opportunities for an opportunity record type. It's more than just a board: this tool helps your reps keep their deals on track and moving forward. The word *kanban* refers to a system for optimizing work to increase continuous production and balance workload. This feature is available in Lightning Experience only.

#### Team Up to Close Deals in Lightning Experience

Your sales reps can now increase and simplify a sales team's access to opportunities by putting together a winning opportunity team in Lightning Experience. Opportunity team members have increased access to the opportunity and its related records.

## Opportunity Board Is Now Opportunity Kanban

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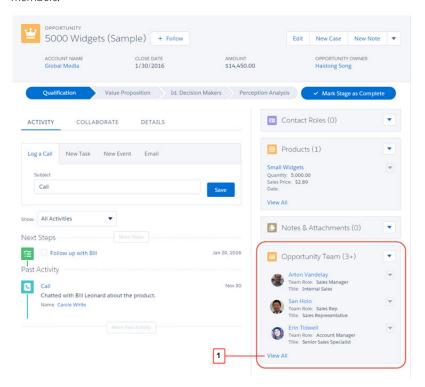


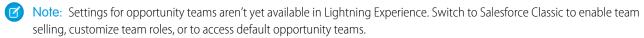
## Team Up to Close Deals in Lightning Experience

Your sales reps can now increase and simplify a sales team's access to opportunities by putting together a winning opportunity team in Lightning Experience. Opportunity team members have increased access to the opportunity and its related records.



The opportunity team related list shows who's on the team (1). Click **View All** to view more team members.





# Productivity Features: Help Sales Reps Do More with Lightning Experience

Get your reps to spend time wisely on the things that help them keep their deals moving along. Integrated email, an activity timeline, and a better experience with calendars and events help reps stay focused on the important things for closing deals fast.

#### IN THIS SECTION:

## List Views: Find Data Faster in Lightning Experience

With the ability to create and edit custom list views and filters in Lightning Experience, sales and service professionals can take advantage of powerful ways to rapidly find relevant data. They can also resize columns to optimize their viewing area in object home and list views.

#### Home: Keep Tabs on Your Meeting Schedule and Task List

Home is now even more of a control center for your sales reps. They can now see upcoming meetings, tasks that are due today, and more information about relevant accounts without leaving the Home page. This feature is available in Lightning Experience only.

#### Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience

Sales and service pros can achieve a whole new level of multitasking with global actions and the new composer window. From the Global Actions menu, it's easy to jot down a guick note or log a call without switching away from other work in progress. The menu serves up frequently used global actions—the same ones available in Salesforce Classic and the Salesforce1 mobile app. The menu frees teammates from having to search for the right record before knocking off a to-do item. And no more juggling several browser tabs to create multiple notes or activities at the same time. Global actions open in composer windows on the current page. This feature is available in Lightning Experience only.

### Email: Be More Productive with a Pop-Out Composer Window, Updatable Templates, and More in Lightning Experience

Lightning Email offers efficiency and usability upgrades plus full support for Campaigns and partial support for Person Accounts (Beta in Lightning Experience) and Cases. Users can compose email in a handy pop-out window. They can also search for merge fields to use in templates or individual emails. With Automatic BCC, users can get copies of sent emails in their inboxes. If recipients have opted out of receiving mass emails, users see an opt-out indicator. And we notify users before they send if email to a recipient has bounced before. This feature is available in Lightning Experience only.

#### Activities: Keep Up with the Speed of Business in Lightning Experience

New ways of creating and managing events and tasks help your sales reps keep up with their deals and accounts better than before.

#### Notes: Compose from Any Lightning Page and Let Reps Restore Previous Versions

The enhanced version of Notes offers increased flexibility, allowing sales reps to create a note from any Lightning page. Reps can also view or restore previous versions of a note, and include images in their notes. This feature is available in Lightning Experience only.

## List Views: Find Data Faster in Lightning Experience

With the ability to create and edit custom list views and filters in Lightning Experience, sales and service professionals can take advantage of powerful ways to rapidly find relevant data. They can also resize columns to optimize their viewing area in object home and list views.

#### IN THIS SECTION:

#### Filter and Customize to Get Data Faster in Lightning Experience (Generally Available)

Now your users can sort and filter their data as in Salesforce Classic, but with the added ability to create on-the-fly filters from Lightning Experience's intuitive interface. This feature is available in both Lightning Experience and Salesforce Classic.

### Resize Columns in Lightning Experience

Columns in object home and list views are now resizable, so your sales reps can optimize the viewing area of specific columns. This feature is available in both Lightning Experience and Salesforce Classic.

# Filter and Customize to Get Data Faster in Lightning Experience (Generally Available)

Now your users can sort and filter their data as in Salesforce Classic, but with the added ability to create on-the-fly filters from Lightning Experience's intuitive interface. This feature is available in both Lightning Experience and Salesforce Classic.

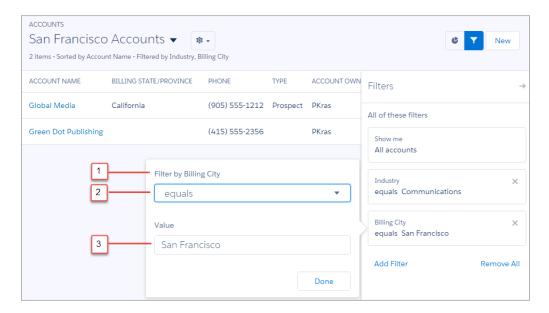
Create list views easily by choosing **New** from List View Controls , then naming the list and setting sharing options.



Filters display records based on criteria set by a user. There are different options depending on the object type. When adding a filter, specify a field (1) and an operator (2), and then select or enter a value (3). For example, if some reps are planning a trip to San Francisco, they can create a list of accounts to visit by setting a filter where Billing City equals San Francisco. They can further refine the list by filtering by industry type or other fields.

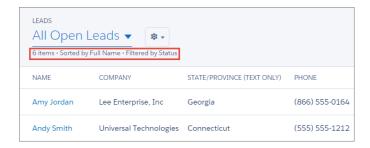
# **EDITIONS**

Available in Lightning Experience in: Contact Manager, Personal, Group, Professional, Enterprise, Performance, Unlimited, and **Developer** Editions



The Filters panel slides out when users create a list view, select **Edit Filters** from List View Controls, or click . The Filter panel shows filters and the resulting list data side by side.

Your users can tell at a glance how many records a list view contains, and how they're sorted and filtered.



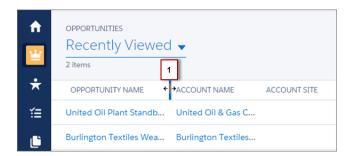
List views in Lightning Experience also offer charts that graphically represent list view records and their data.

## Resize Columns in Lightning Experience

Columns in object home and list views are now resizable, so your sales reps can optimize the viewing area of specific columns. This feature is available in both Lightning Experience and Salesforce Classic.

When users resize a column on a list view, the new width is retained on their subsequent reloads for that list view. However, Recently Viewed list views don't retain new widths when users resize their columns.

Column resizing is available on all object home pages, such as for accounts, cases, contacts, leads, and opportunities. On the Opportunity home page, column resizing is available in the grid view but not the Opportunity Kanban. The length of the column header label determines the minimum width of the column.



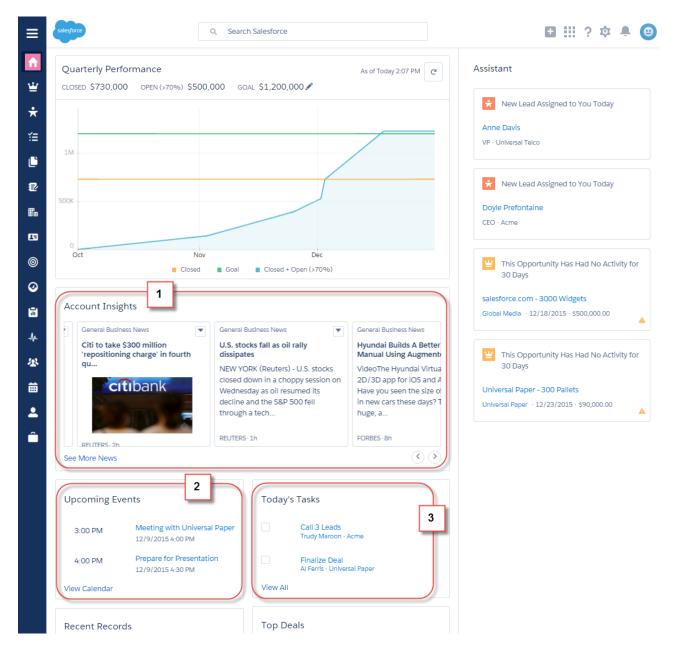
To use the keyboard for column resizing, users can press tab until they are at the column divider (1) for the column they want to resize. Then press the left or right key to decrease or increase the column width.

# Home: Keep Tabs on Your Meeting Schedule and Task List

Home is now even more of a control center for your sales reps. They can now see upcoming meetings, tasks that are due today, and more information about relevant accounts without leaving the Home page. This feature is available in Lightning Experience only.

# EDITIONS

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



- 1. Account Insights lets sales reps scroll through insights without leaving the Home page. Reps can also provide feedback on individual insights to improve the relevancy of insights.
- **2.** Upcoming Events shows the next five meetings on a sales rep's calendar today. Past events drop off the list as the day progresses. Click **View Calendar** to access your full calendar for the day.

**3.** Today's Tasks shows up to five tasks due today. Sales reps can mark a task as done with one click, or click **View All** to go to the task page. The Assistant no longer shows tasks due today or overdue tasks.

#### SEE ALSO:

Salesforce Help: Manage Events in Lightning Experience

Salesforce Help: Manage Tasks in Lightning Experience

Lightning Experience: A New, Modern, Intelligent User Experience

Productivity Features: What's Not in Lightning Experience

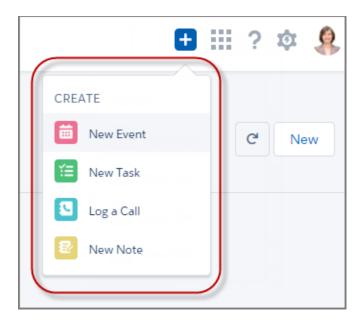
Salesforce Help: Actions in Lightning Experience

Salesforce Help: Considerations for Customizing the Task List in Lightning Experience

# Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience

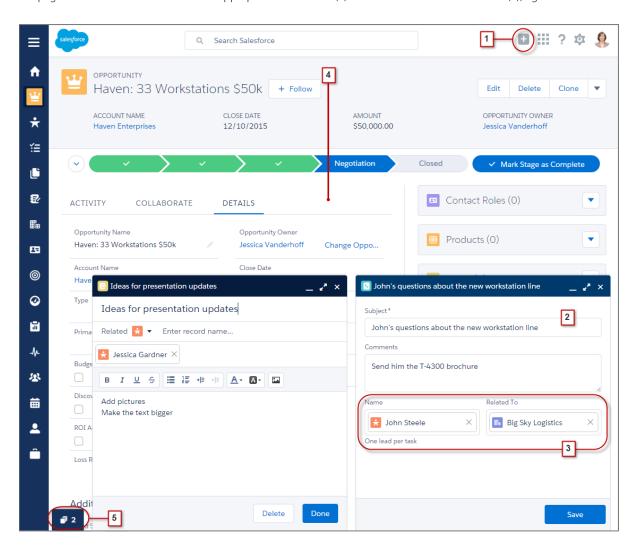
Sales and service pros can achieve a whole new level of multitasking with global actions and the new composer window. From the Global Actions menu, it's easy to jot down a quick note or log a call without switching away from other work in progress. The menu serves up frequently used global actions—the same ones available in Salesforce Classic and the Salesforce1 mobile app. The menu frees teammates from having to search for the right record before knocking off a to-do item. And no more juggling several browser tabs to create multiple notes or activities at the same time. Global actions open in composer windows on the current page. This feature is available in Lightning Experience only.

The Global Actions menu is always available in the header, making it easy to access global actions from any page. The menu displays a subset of global actions from the Salesforce1 and Lightning Experience Actions section of the global publisher layout. Specifically, you get these global actions.



The Lightning Experience activity composer already makes it easy to relate notes, events, tasks, and logged calls to a specific record. And now the Global Actions menu adds another dimension with a convenient way to create a note or activity that's not related to the current page.

For example, our sales rep, Joan, is working a deal while getting a return call from a lead she's nurturing. Joan wants to log the call right away without navigating elsewhere. She clicks in the header (1) and types comments in the composer window (2) that opens on the page. Joan also relates the call to the appropriate lead record (3). And then she's back to the deal (4), right where she left off.



But wait! Our sales rep gets a great idea how to convert that lead. But it requires updating a presentation deck and getting colleagues on board. The good news is that Joan can fire off multiple global actions at the same time. So she writes a note about her idea and creates a task to update the presentation. And Joan even sets up a meeting with her sales team—all from separate composer windows that open side-by-side.

Composer windows dock along the bottom of the page. When a screen doesn't have room to display all open composer windows, they stack up in an overflow menu (5).

## Keyboard Shortcuts for Working in Composer Windows

Keyboard shortcut fans are going to love cycling through fields in a composer window and navigating across multiple open windows.

- Alt+1: opens the overflow menu from anywhere on the page
- Up and Down arrows: moves through the list of open composer windows in the overflow menu
- Left and Right arrows: moves between open composer windows

- Enter (from a composer window's header): moves focus to inside the composer window
- Tab: cycles through the fields inside the composer window
- Esc: moves focus from a composer window to the window's header

#### SEE ALSO:

Easily Create a Note from Any Page
Activities Global Actions: Create Activities on the Spot, When You Want

# Email: Be More Productive with a Pop-Out Composer Window, Updatable Templates, and More in Lightning Experience

Lightning Email offers efficiency and usability upgrades plus full support for Campaigns and partial support for Person Accounts (Beta in Lightning Experience) and Cases. Users can compose email in a handy pop-out window. They can also search for merge fields to use in templates or individual emails. With Automatic BCC, users can get copies of sent emails in their inboxes. If recipients have opted out of receiving mass emails, users see an opt-out indicator. And we notify users before they send if email to a recipient has bounced before. This feature is available in Lightning Experience only.

We've also updated the API documentation for the EmailTemplates and UserPreference objects. Read about those changes in Changed Objects.



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

## Implementation Considerations

If Email is missing from the activity composer on opportunities or records for other supported objects, check your page layout and permissions settings. For instructions, see "Configure Send Email Action in the Activity Composer in Lightning Experience" in the Salesforce Help.

Make sure that you and your users understand access and sharing for Email merge fields, templates, and attachments. Point them to "Access and Sharing for Email Merge Fields, Templates, and Attachments" in the Salesforce Help.

So your organization can take full advantage of attachments in Email, we recommend that you enable Content Deliveries for your organization.

Make sure that Shared Activities is enabled for optimal email task creation. If Shared Activities is enabled and a user sends email to multiple contacts, Salesforce creates a single closed task for that email and each contact record links to that task. If Shared Activities is not enabled and a user sends email to multiple contacts, Salesforce creates duplicate closed tasks: one for *each* of those contacts. For more information, see "Considerations for Enabling Shared Activities (Multiple Contacts on an Activity)" and "Find Email Sent from a Salesforce Record" in the Salesforce Help.

Before sending email for the first time, all administrators and users must verify their email addresses. Just follow the prompt.

#### IN THIS SECTION:

#### Write Email and Create Templates More Efficiently From the Composer Window

With the click of a button, users can pop out a window to compose an email or create a template. Research and multitasking are easier because users can navigate the current record or other Salesforce pages while the window is open. Users can also expand the composer window for more writing room. Within the composer window, the related record is automatically linked to the email.

#### Update and Maintain Email Templates More Easily

Found a great Lightning email template that would work for you with a few modifications? Need to make routine updates? Select that template, then edit and save it. Saving the changed version as a new template is now optional.

#### Send Email from Campaign and Case Records

Email is now available for Campaigns, offering the same features you already enjoy with other records, including templates, merge fields, and file attachments. Campaigns also get the Email enhancements for Spring '16: a pop-out composer window, searchable merge fields, and opt-out and bounce information. Email is also partially supported for Cases, but features such as merge fields, file attachments, and Spring '16 Email enhancements aren't included.

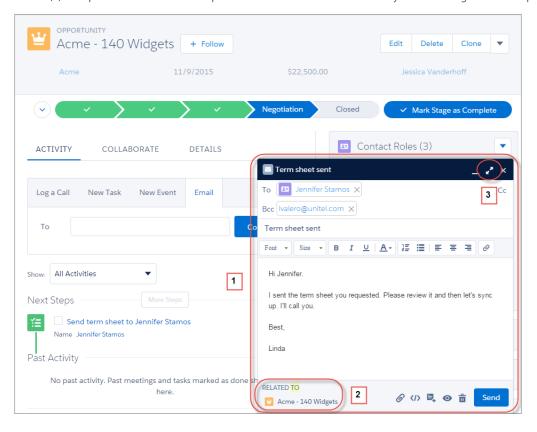
#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience Productivity Features: What's Not in Lightning Experience Person Accounts: Supported in Lightning Experience (Beta)

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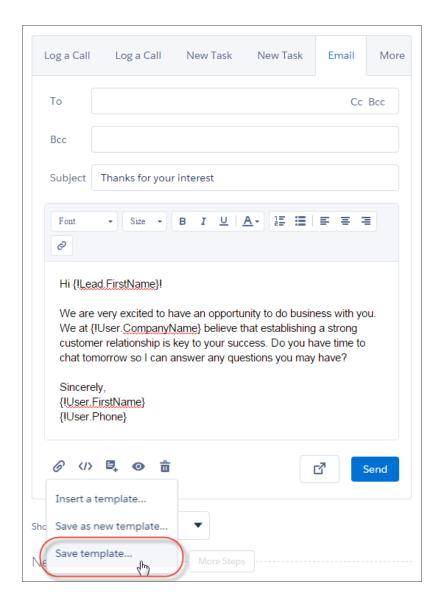
With the click of a button, users can pop out a window to compose an email or create a template. Research and multitasking are easier because users can navigate the current record or other Salesforce pages while the window is open. Users can also expand the composer window for more writing room. Within the composer window, the related record is automatically linked to the email.

To write an email or create a template in the composer window, start by clicking **Email** from the Activity tab. From there, click the popout button to open the window (1), where the current record is automatically related (2). If you want more space to write, click the maximize button (3) to expand the window. The expanded window can't be moved and you can't navigate to other pages when it's open.



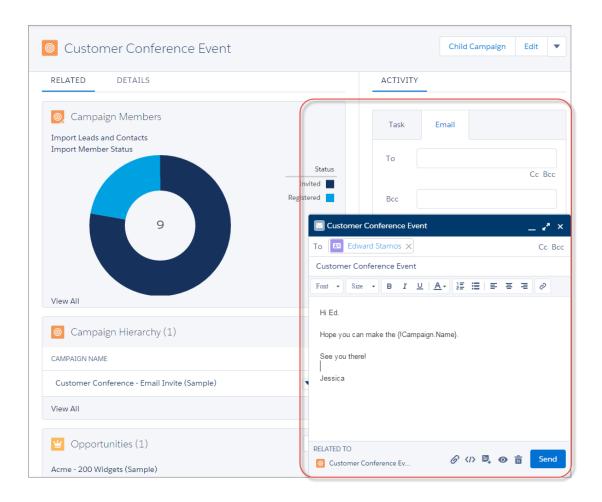
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# Activities: Keep Up with the Speed of Business in Lightning Experience

New ways of creating and managing events and tasks help your sales reps keep up with their deals and accounts better than before.

#### IN THIS SECTION:

#### Activities Global Actions: Create Activities on the Spot, When You Want

Now when sales reps finish a call or take a step to move a deal ahead, they don't have to navigate to a customer's record first. From any page, reps can instantly log a call or create a task or event, relating it to the lead, opportunity, account, or contacts they choose. Activities that a rep doesn't relate to another record are private. This feature is available in Lightning Experience only.

# EDITIONS

Available in Lightning Experience in: Contact Manager, Personal, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

#### Activity Timeline: Zero In on the Activities You Want to See

The activity timeline shows all the activities on an opportunity, a lead, an account, or a contact. Now your sales reps can filter out everything but the activity they want to monitor: just calls, tasks, meetings, or emails. This feature is available in Lightning Experience only.

#### Calendar: Create a Meeting by Clicking a Time Slot

Now your reps can add a meeting to their calendar with one click.

#### Opportunity Calendar: Stay on Top of Opportunities (Beta)

Now your sales reps can track the close dates of opportunities they own alongside the Salesforce events in their calendar. This feature is available in Lightning Experience only.

#### Task List: Let Overdue Tasks Wait

Do your sales reps have a lot of old overdue tasks? We've moved them aside to minimize distractions from reps' highest priorities. **All Overdue** shows overdue tasks regardless of due date. As before, **My Tasks** still shows tasks with due dates in the past 30 days. This feature is available in Lightning Experience only.

#### Other Changes in Activities

To improve usability and performance, we've changed the calendar in Lightning Experience and the user interface for activity reminders and emails in Salesforce Classic.

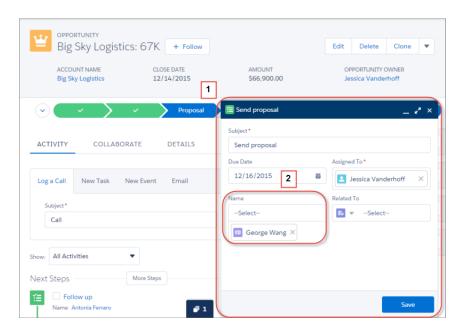
#### SEE ALSO:

Salesforce Help: Person Account Behaviors

## Activities Global Actions: Create Activities on the Spot, When You Want

Now when sales reps finish a call or take a step to move a deal ahead, they don't have to navigate to a customer's record first. From any page, reps can instantly log a call or create a task or event, relating it to the lead, opportunity, account, or contacts they choose. Activities that a rep doesn't relate to another record are private. This feature is available in Lightning Experience only.

On any page, a sales rep can use the Global Actions menu to select **Log a Call**, **New Task**, or **New Event**. The activity opens in the composer window (1), where sales reps can choose whether to relate the activity to a record (2).



Notes: Compose from Any Lightning Page and Let Reps Restore Previous Versions

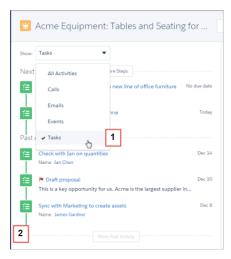
#### SEE ALSO:

Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience Write Email and Create Templates More Efficiently From the Composer Window

## Activity Timeline: Zero In on the Activities You Want to See

The activity timeline shows all the activities on an opportunity, a lead, an account, or a contact. Now your sales reps can filter out everything but the activity they want to monitor: just calls, tasks, meetings, or emails. This feature is available in Lightning Experience only.

On this opportunity, the sales rep has filtered (1) the activity timeline to show only tasks (2).



SEE ALSO:

Salesforce Help: Track Events and Tasks Together in Lightning Experience

## Calendar: Create a Meeting by Clicking a Time Slot

Now your reps can add a meeting to their calendar with one click.

SEE ALSO:

Salesforce Help: Calendar Views in Lightning Experience

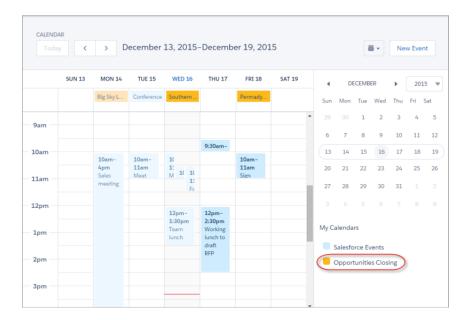
## Opportunity Calendar: Stay on Top of Opportunities (Beta)

Now your sales reps can track the close dates of opportunities they own alongside the Salesforce events in their calendar. This feature is available in Lightning Experience only.



**Note**: This release contains a beta version of the opportunity calendar, which means it's a high-quality feature with known limitations. You can provide feedback and suggestions for the opportunity calendar in the Productivity group in the Success Community.

This sales rep's calendar shows several opportunities due to close this week.



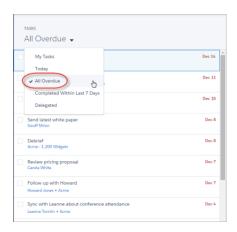
#### SEE ALSO:

Salesforce Help: Calendar Views in Lightning Experience

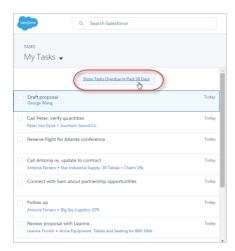
#### Task List: Let Overdue Tasks Wait

Do your sales reps have a lot of old overdue tasks? We've moved them aside to minimize distractions from reps' highest priorities. **All Overdue** shows overdue tasks regardless of due date. As before, **My Tasks** still shows tasks with due dates in the past 30 days. This feature is available in Lightning Experience only.

**All Overdue** displays overdue tasks regardless of due date.



A link in My Tasks helps prevent reps from losing track of recently overdue tasks.



#### SEE ALSO:

Salesforce Help: Manage Tasks in Lightning Experience

## Other Changes in Activities

To improve usability and performance, we've changed the calendar in Lightning Experience and the user interface for activity reminders and emails in Salesforce Classic.

#### IN THIS SECTION:

#### Calendar Views: Limit Added on Items Displayed

To improve performance, the calendar now displays no more than 150 items—Salesforce events and opportunity close dates combined.

#### New Events Prefilled with Date and Time

The user interface for creating an event in Salesforce1 or in the activity timeline in Lightning Experience has been improved. The start time is now prefilled with the next full hour, and the end time is one hour later.

#### Calendar Views: Long Events Displayed at Top

Calendar views now display events that last more than 24 hours at the top, together with all-day events. Previously, the calendar displayed those events in time slots across days.

#### Calendar Week View: Date Added

The week view now shows the date along with the day of the week.

#### Activity Reminders and Emails: User Setting Interface Improved in Salesforce Classic

To improve usability, we've changed the page Activity Reminders (previously called Reminders & Alerts), where users set preferences for reminders and emails.

#### Calendar Views: Limit Added on Items Displayed

To improve performance, the calendar now displays no more than 150 items—Salesforce events and opportunity close dates combined.

#### SEE ALSO:

Salesforce Help: Calendar Views in Lightning Experience

#### New Events Prefilled with Date and Time

The user interface for creating an event in Salesforce1 or in the activity timeline in Lightning Experience has been improved. The start time is now prefilled with the next full hour, and the end time is one hour later.

#### Calendar Views: Long Events Displayed at Top

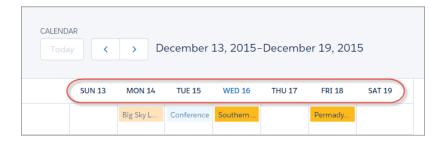
Calendar views now display events that last more than 24 hours at the top, together with all-day events. Previously, the calendar displayed those events in time slots across days.

SEE ALSO:

Salesforce Help: Calendar Views in Lightning Experience

#### Calendar Week View: Date Added

The week view now shows the date along with the day of the week.



SEE ALSO:

Salesforce Help: Calendar Views in Lightning Experience

#### Activity Reminders and Emails: User Setting Interface Improved in Salesforce Classic

To improve usability, we've changed the page Activity Reminders (previously called Reminders & Alerts), where users set preferences for reminders and emails.

To find the page, follow these steps.

- 1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
- 2. From the left panel, select one of the following:
  - If you clicked Setup, select My Personal Information > Calendar & Reminders > Reminders & Alerts.
  - If you clicked My Settings, select Personal > Calendar & Reminders > Reminders & Alerts.

Here's what we changed.

- The page Reminders & Alerts is now called Activity Reminders.
- The section Events and Tasks is now called Reminder Settings.
- The setting Email me when someone assigns me a task now appears under a new section called Email Settings.



Available in Salesforce Classic in: **All** Editions Except Database.com The section Test and Preview Reminder Alerts is now called Does Your Browser Block Reminders?

#### SEE ALSO:

Salesforce Help: Activity Reminders in Salesforce Classic
Salesforce Help: Considerations for Activity Reminder Setup in Salesforce Classic

# Notes: Compose from Any Lightning Page and Let Reps Restore Previous Versions

The enhanced version of Notes offers increased flexibility, allowing sales reps to create a note from any Lightning page. Reps can also view or restore previous versions of a note, and include images in their notes. This feature is available in Lightning Experience only.



**Attention:** If you want to start using Notes, first Configure Page Layouts for Notes and Set Up Notes.

#### IN THIS SECTION:

#### Easily Create a Note from Any Page

With Global Actions, users can now add a note from within any page in Salesforce. Users can keep a note private or relate it to one or more records.

#### View and Restore Previous Versions of Notes

Your sales reps can go back to previous versions of a note to see what's changed. They can also revert to any previous version of a note.

#### Include Images in Notes

Your sales users can now add clarity and value to their notes by including images from their computer or the web.

#### Filter the Notes List View

Sales users can now filter the list of notes on the Notes home page, making it easier to find the notes they're looking for. Users can filter for notes they own, recently viewed notes, or notes shared with them.

#### Notes No Longer Requires Chatter

The enhanced version of Notes no longer requires that Chatter is enabled. Notes and Chatter can now be used independently.

#### Check Spelling in Your Notes

Sales users can now see their spelling errors highlighted automatically when they create or edit a note with the enhanced note taking tool.

## Easily Create a Note from Any Page

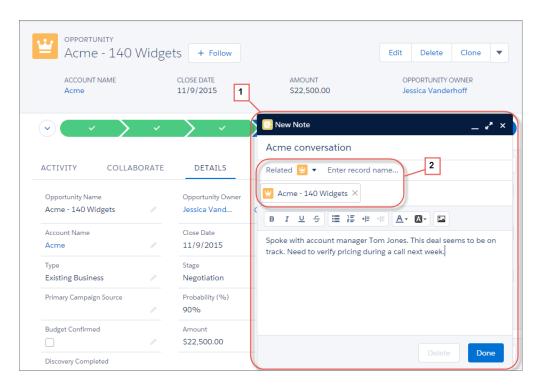
With Global Actions, users can now add a note from within any page in Salesforce. Users can keep a note private or relate it to one or more records.

From any page in Salesforce, users can create a note. From the Global Actions menu , select **New Note**. The new note opens in the composer window (1), where users can enter their note and choose whether to relate the note to a record (2).

# **EDITIONS**

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

Notes available in Salesforce Classic in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

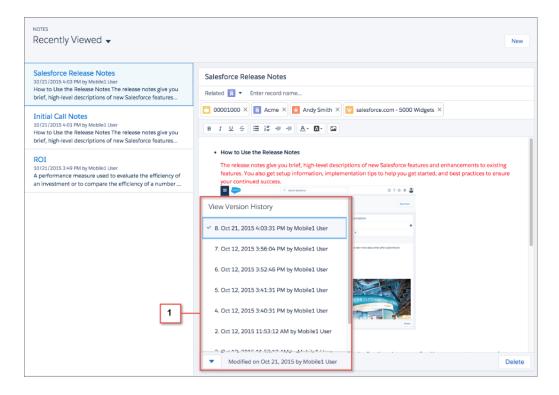


For complete information about the Global Actions menu and using the composer window, see Global Actions and Composer Windows: Take Notes, Add Events and Tasks, and Log Calls from Anywhere in Lightning Experience.

#### View and Restore Previous Versions of Notes

Your sales reps can go back to previous versions of a note to see what's changed. They can also revert to any previous version of a note.

When sales users add notes to records, they can now view the previous versions of the note. Users can see a preview of each version of the note when choosing which version to look at. To revert to a previous version, users can select it from the list (1).



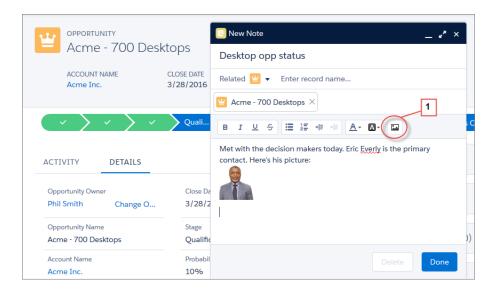
In the Salesforce1 mobile app, users can view the selected version of the note, but they can't change to a different version.

## Include Images in Notes

Your sales users can now add clarity and value to their notes by including images from their computer or the web.

For example, to illustrate the risk to a deal, a sales user can include a picture of a competing product in a note on the opportunity.

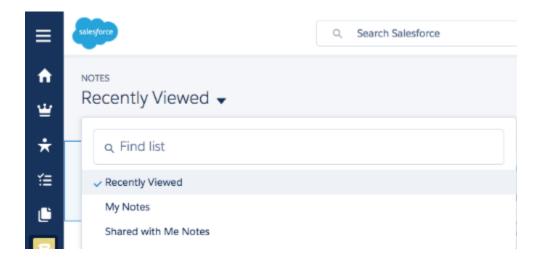
To add an image to a note, users can click the image icon (1) in the composer and navigate to the image they want to include.



In the Salesforce1 mobile app, users can view images in notes, but they can't add an image to a note.

#### Filter the Notes List View

Sales users can now filter the list of notes on the Notes home page, making it easier to find the notes they're looking for. Users can filter for notes they own, recently viewed notes, or notes shared with them.



## Notes No Longer Requires Chatter

The enhanced version of Notes no longer requires that Chatter is enabled. Notes and Chatter can now be used independently.

## Check Spelling in Your Notes

Sales users can now see their spelling errors highlighted automatically when they create or edit a note with the enhanced note taking tool.

# Microsoft® Integration: Sync and Work Between Microsoft Email Systems and Salesforce

Get users syncing contacts, events, and tasks between Microsoft email systems and Salesforce, as well as working with Salesforce records directly in Outlook® and other Microsoft email apps.

#### IN THIS SECTION:

#### Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud

Get more done without switching between Microsoft applications and Salesforce. Learn about new features, product changes, and a critical requirement to upgrade your encryption protocol. You can manage Salesforce App for Outlook in both Lightning Experience and Salesforce Classic.

## Exchange Sync: Sync Microsoft® Contacts and Events Without Software (Beta)

Keeps your reps' contacts and events in sync between Microsoft<sup>®</sup> Exchange-based email and Salesforce without asking reps to install and maintain software. You can manage Exchange Sync in both Lightning Experience and Salesforce Classic.

#### Salesforce for Outlook: Integrate Microsoft® Outlook® and Salesforce

Salesforce for Outlook is a Microsoft email integration feature that lets sales reps experience Salesforce directly in Outlook, and syncs contacts, events, and tasks between systems. Unlike our other features that integrate Microsoft email with Salesforce, reps or IT administrators at your company install Salesforce for Outlook locally on reps' Windows desktops. You can manage Salesforce for Outlook in both Lightning Experience and Salesforce Classic.

## Connect for Office: End of Support

When Salesforce disables TLS 1.0, we're ending support for Connect for Office.

## Mail Merge: End of Support

When Salesforce disables TLS 1.0, we're ending support for standard Mail Merge. Salesforce continues to support Extended Mail Merge, and encourages reps to transition to this feature.

# Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud

Get more done without switching between Microsoft applications and Salesforce. Learn about new features, product changes, and a critical requirement to upgrade your encryption protocol. You can manage Salesforce App for Outlook in both Lightning Experience and Salesforce Classic.



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

#### IN THIS SECTION:

## Support for Using Outlook for Mac 2016

It's official! We now support using Salesforce App for Outlook with Outlook for Mac 2016.

## Create Salesforce Records Directly in Microsoft Email Applications

Keep sales reps focused on the selling process when they create records like leads, opportunities, cases, and even custom objects—all from your reps' email applications. Set up and manage global actions to help your reps manage their sales with ease.

#### Relate Emails to Salesforce with Microsoft® Exchange 2013 On-Premises

Track important emails in Salesforce—even when using Exchange 2013 on-premises!

## My Domain Now Supported for Salesforce App for Outlook

If your company is set up to use My Domain, your sales teams can now take advantage of Salesforce App for Outlook.

#### Forget the Name Email Connect

Do you remember Email Connect? If not, that's fine! Up to now, Email Connect was the name of our product area that included Salesforce App for Outlook and Exchange Sync. While the name Email Connect goes away, Salesforce App for Outlook and Exchange Sync stay.

#### Verify Your Security Protocol to Avoid Service Interruptions

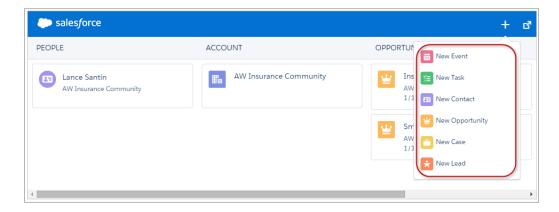
After Salesforce disables TLS (Transport Layer Security) 1.0 encryption protocol, make sure that your browsers and operating systems are compatible with TLS 1.1 or later to continue using Salesforce App for Outlook.

## Support for Using Outlook for Mac 2016

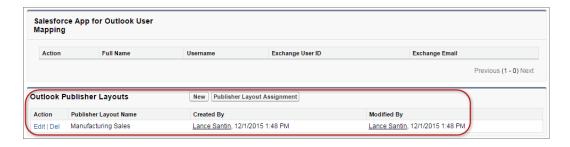
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## Create Salesforce Records Directly in Microsoft Email Applications

Keep sales reps focused on the selling process when they create records like leads, opportunities, cases, and even custom objects—all from your reps' email applications. Set up and manage global actions to help your reps manage their sales with ease.



From the App for Outlook Settings page, you create a layout that includes the global actions you want to appear for your sales reps.



Standard actions let reps create events, tasks, contacts, opportunities, cases, and leads. But you can change actions or add others, like accounts or custom objects. To customize global actions from Setup, enter Global Actions in the **Quick Find** box.

# Relate Emails to Salesforce with Microsoft® Exchange 2013 On-Premises

Track important emails in Salesforce—even when using Exchange 2013 on-premises!

We've added support for relating emails to Salesforce records when using Exchange 2013 on-premises with Salesforce App for Outlook. Now your reps can relate emails to Salesforce records regardless of whether your company's Exchange server is on-premise or online.

## My Domain Now Supported for Salesforce App for Outlook

If your company is set up to use My Domain, your sales teams can now take advantage of Salesforce App for Outlook.

We recommend a way for your sales reps to log in to Salesforce. First, reps open a tab in a browser. Then, reps log in to Salesforce. And in another browser tab or their Outlook application, reps start using Salesforce App for Outlook.

## Forget the Name Email Connect

Do you remember Email Connect? If not, that's fine! Up to now, Email Connect was the name of our product area that included Salesforce App for Outlook and Exchange Sync. While the name Email Connect goes away, Salesforce App for Outlook and Exchange Sync stay. Instead, Salesforce App for Outlook gets promoted as the main product, with Exchange Sync serving as its trusty sync component.

## Verify Your Security Protocol to Avoid Service Interruptions

After Salesforce disables TLS (Transport Layer Security) 1.0 encryption protocol, make sure that your browsers and operating systems are compatible with TLS 1.1 or later to continue using Salesforce App for Outlook.

Check out our article on how to prepare your reps' computing environments so that they can continue using Salesforce App for Outlook after TLS 1.0 disablement.

For a disablement timeline, check out our article on general Salesforce TLS 1.0 disablement.

#### SEE ALSO:

*Knowledge Article*: Prepare Your Org to Continue Using Salesforce App for Outlook and Exchange Sync After TLS 1.0 Is Disabled *Knowledge Article*: Salesforce Disabling TLS 1.0

# Exchange Sync: Sync Microsoft® Contacts and Events Without Software (Beta)

Keeps your reps' contacts and events in sync between Microsoft® Exchange-based email and Salesforce without asking reps to install and maintain software. You can manage Exchange Sync in both Lightning Experience and Salesforce Classic.



**Note:** Exchange Sync is currently available as a beta feature, which means it's a high-quality feature with known limitations. Check out our Exchange Sync Implementation Guide to set up the feature at your company.



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

#### IN THIS SECTION:

#### Sync Sales Reps' Private Events

When sales reps can clearly see their colleagues' availability, scheduling meetings becomes a breeze. Allow reps to more accurately share their availability by letting them sync their private events between Salesforce and their calendar applications. Regardless of whether you enable this feature, your reps experience some changes in how their private events sync staring in Spring '16. Make sure you understand these changes, and communicate them to your reps.

#### Exchange Sync Supports Microsoft® Exchange Server 2016

Now companies running Exchange 2016 can keep sales reps' contacts and events in sync using Exchange Sync. Before rolling out Exchange Sync to your sales teams, review all the system requirements.

#### Test Your Connection Between Salesforce and Microsoft® Exchange

During set up, learn more about your connection status so that if there are issues, you spend less time troubleshooting and more time solving them. The Exchange Sync connection test checks several points of connectivity and gives details about whether you and your Exchange administrator have set up Exchange Sync correctly. It also checks your Exchange server configuration and gives more details when your configuration is incompatible with Exchange Sync.

#### Your Contacts and Events Sync Faster—After Some Brief Downtime

Good news: We've made some behind-the-scenes adjustments so that your sales team's contacts and events sync faster than ever before. However, these improvements take time to take effect, so Exchange Sync can be unavailable for up to 72 hours after the Spring '16 release. In most cases, we anticipate less downtime.

#### Verify Your Security Protocol to Avoid Service Interruptions

When Salesforce disables TLS 1.0 encryption protocol, work with your Exchange administrator to enable TLS 1.1 or later on your Microsoft Exchange server to continue syncing your reps' contacts and events with Exchange Sync.

### Sync Sales Reps' Private Events

When sales reps can clearly see their colleagues' availability, scheduling meetings becomes a breeze. Allow reps to more accurately share their availability by letting them sync their private events between Salesforce and their calendar applications. Regardless of whether you enable this feature, your reps experience some changes in how their private events sync staring in Spring '16. Make sure you understand these changes, and communicate them to your reps.

After you turn on private event sync, new and existing events that reps mark as private begin syncing according to the settings you've determined in the rep's configuration. Private events begin syncing whether they're created or updated in Salesforce or the reps' calendar applications.

When private events start syncing, certain private event details are visible to reps' colleagues and supervisors depending on which system events are viewed in, and how reps have set their calendar sharing settings in Salesforce.

## USER PERMISSIONS

To create, edit, or delete Exchange Sync configurations:

"View Setup and Configuration"

AND

"Manage Email Client Configurations"

In Salesforce, private event start and end times are visible to colleagues, but event details are hidden. All private event details are visible to Salesforce administrators who can view, edit, and report on events. Reps can choose to share more private event details with their colleagues by changing their calendar sharing level in their Personal Settings.

In your calendar application, private event details are shared with colleagues and supervisors as they always have been. Refer to that calendar application documentation for more information.

Regardless of whether you decide to turn private event sync on or leave it off, all reps experience changes with how their private events sync between Salesforce and their calendar applications. Prior to Spring '16, whether private events synced depended on when the event was marked as private. (If the event was marked as private when it was created, it wasn't synced. If an existing event that was already syncing was later changed to private, it did sync.)

Starting in Spring '16, even when you leave private event sync off, private events that were being synced continue to sync until a rep updates the event in either system. After the event is updated, the new private event sync setting takes effect and the event does not sync again. A version of the private event remains in both Salesforce and the rep's calendar until the rep deletes one or both of them.

Important: Your reps won't receive alerts or updates about how their private events sync starting in Spring '16. Once you decide whether you're turning on the private event sync feature, it's important that you communicate which experience they'll have so they'll know what to expect. Communicating how private events sync lets reps prepare their calendars to sync with Salesforce. And quarantees you keep Great Aunt Alberta's 95th birthday party out of your Salesforce org.

Follow these steps to sync sales reps' private events.

- 1. Open the Exchange Sync configuration for the reps you want to sync.
- 2. Select Sync Private Events.
- 3. Click Save.

### SEE ALSO:

Salesforce Help: What's the difference between private items in both Salesforce and Microsoft® Outlook®? Salesforce Help: Access to Activities

Salesforce Help: Share Your Calendar in Salesforce Classic

## Exchange Sync Supports Microsoft® Exchange Server 2016

Now companies running Exchange 2016 can keep sales reps' contacts and events in sync using Exchange Sync. Before rolling out Exchange Sync to your sales teams, review all the system requirements.

SEE ALSO:

Salesforce Help: Exchange Sync System Requirements

## Test Your Connection Between Salesforce and Microsoft® Exchange

During set up, learn more about your connection status so that if there are issues, you spend less time troubleshooting and more time solving them. The Exchange Sync connection test checks several points of connectivity and gives details about whether you and your Exchange administrator have set up Exchange Sync correctly. It also checks your Exchange server configuration and gives more details when your configuration is incompatible with Exchange Sync.

- 1. From Setup, enter Exchange Sync Setup in the Quick Find box.
- **2.** In the Connection Test section, enter one of the email addresses you've set up your Exchange service account to impersonate.

#### 3. Click Test.

Salesforce then confirms whether your users are ready to sync or whether you have a connection issue between Salesforce and your Exchange server. When possible, the connection test gives you more details about connection issues to assist in troubleshooting.

## Your Contacts and Events Sync Faster—After Some Brief Downtime

Good news: We've made some behind-the-scenes adjustments so that your sales team's contacts and events sync faster than ever before. However, these improvements take time to take effect, so Exchange Sync can be unavailable for up to 72 hours after the Spring '16 release. In most cases, we anticipate less downtime.

While Exchange Sync improvements take effect, Exchange Sync pages can be unavailable in Salesforce Setup for up to 48 hours. During this time, contacts and events don't sync between Salesforce and your reps' email applications.

When Exchange Sync Setup pages are online again, it can take an additional 24 hours to sync contact and event changes that occurred during the downtime.

After Exchange Sync finishes bulk-syncing contacts and events that changed during the downtime, sync schedules return to normal: every few minutes after a rep adds or updates an item.

## Verify Your Security Protocol to Avoid Service Interruptions

When Salesforce disables TLS 1.0 encryption protocol, work with your Exchange administrator to enable TLS 1.1 or later on your Microsoft Exchange server to continue syncing your reps' contacts and events with Exchange Sync.

Check out our article on how to prepare your reps' computing environments so that they can continue using Exchange Sync after TLS 1.0 disablement.

For a disablement timeline, check out our article on general Salesforce TLS 1.0 disablement.

#### SEE ALSO:

*Knowledge Article*: Prepare Your Org to Continue Using Salesforce App for Outlook and Exchange Sync After TLS 1.0 Is Disabled *Knowledge Article*: Salesforce Disabling TLS 1.0

## **USER PERMISSIONS**

To test your Exchange Sync setup in Salesforce

"View Setup and Configuration"

## Salesforce for Outlook: Integrate Microsoft® Outlook® and Salesforce

Salesforce for Outlook is a Microsoft email integration feature that lets sales reps experience Salesforce directly in Outlook, and syncs contacts, events, and tasks between systems. Unlike our other features that integrate Microsoft email with Salesforce, reps or IT administrators at your company install Salesforce for Outlook locally on reps' Windows desktops. You can manage Salesforce for Outlook in both Lightning Experience and Salesforce Classic.



### IN THIS SECTION:

### Salesforce for Outlook and Platform Encryption Play Well Together

For companies using Platform Encryption, Salesforce for Outlook is now available if you enable View Encrypted Data for users in profiles. Previously, we prevented companies using Platform Encryption from running Salesforce for Outlook.

### Salesforce for Outlook v3.0.1 Supports Microsoft® .NET Framework 4.5.2

In addition to supporting .NET 4.6.1 and .NET 4.6, Salesforce for Outlook now supports .NET 4.5.2. Sales reps running these Microsoft .NET versions can get the latest improvements with Salesforce for Outlook v3.0.1.

### Upgrade Soon to Avoid Service Interruptions

When Salesforce disables TLS 1.0 encryption protocol, your reps are required to upgrade to Salesforce for Outlook 3.0.0 to continue syncing or accessing the Salesforce Side Panel. Salesforce for Outlook 3.0.0 will be available to customers shortly after the beginning of the Spring '16 release.

### Salesforce for Outlook Retiring Support for Microsoft® Windows Vista®

When Salesforce disables TLS 1.0, Salesforce for Outlook is retiring support for Microsoft Windows Vista.

## Salesforce for Outlook and Platform Encryption Play Well Together

For companies using Platform Encryption, Salesforce for Outlook is now available if you enable View Encrypted Data for users in profiles. Previously, we prevented companies using Platform Encryption from running Salesforce for Outlook.

Keep in mind that if you encrypt the same fields that you filter in Salesforce for Outlook data sets, Salesforce for Outlook won't sync at all. But it's easy to get Salesforce for Outlook to sync again. Just remove the encrypted fields from your filters in your data sets.

## Salesforce for Outlook v3.0.1 Supports Microsoft® .NET Framework 4.5.2

In addition to supporting .NET 4.6.1 and .NET 4.6, Salesforce for Outlook now supports .NET 4.5.2. Sales reps running these Microsoft .NET versions can get the latest improvements with Salesforce for Outlook v3.0.1.

If your company's computing systems aren't running .NET 4.6.1, 4.6, or 4.5.2:

- Sales reps downloading and installing Salesforce for Outlook v3.0.1 themselves are prompted to install .NET 4.5.2 automatically.
- IT administrators managing Salesforce for Outlook v3.0.1 installation using the .msi installer must install a supported .NET version on sales reps' systems before rolling out Salesforce for Outlook v3.0.1.

### Upgrade Soon to Avoid Service Interruptions

When Salesforce disables TLS 1.0 encryption protocol, your reps are required to upgrade to Salesforce for Outlook 3.0.0 to continue syncing or accessing the Salesforce Side Panel. Salesforce for Outlook 3.0.0 will be available to customers shortly after the beginning of the Spring '16 release.

Check out our article on how to prepare your reps' computing environments so that they can continue using Salesforce for Outlook after TLS 1.0 disablement.

For a disablement timeline, check out our article on general Salesforce TLS 1.0 disablement.

SEE ALSO:

*Knowledge Article:* Prepare Your Org to Continue Using Salesforce for Outlook After TLS 1.0 is Disabled *Knowledge Article:* Salesforce Disabling TLS 1.0

## Salesforce for Outlook Retiring Support for Microsoft® Windows Vista®

When Salesforce disables TLS 1.0, Salesforce for Outlook is retiring support for Microsoft Windows Vista.

Visit our Salesforce disabling TLS 1.0 article for the most up-to-date timeline.

We recommend that you start moving your sales reps off Windows Vista soon. Then reps can continue syncing between Salesforce and Microsoft Outlook® after TLS 1.0 disablement.

## Connect for Office: End of Support

When Salesforce disables TLS 1.0, we're ending support for Connect for Office.

When Salesforce disables TLS 1.0, we can't guarantee that Connect for Office can establish a connection with Salesforce when sales teams attempt to access the following features.

- Microsoft Word Add-In that lets reps create templates using Salesforce data for mail merge
- ActiveX control that generates mail merges from Microsoft Word
- Microsoft Excel Add-In that lets reps access Salesforce reports with Microsoft Excel

Even if your reps do establish a connection using Connect for Office, Salesforce will no longer provide support or maintenance when there is an issue.

Reps can remove Connect for Office from their systems by uninstalling the feature.

## Mail Merge: End of Support

When Salesforce disables TLS 1.0, we're ending support for standard Mail Merge. Salesforce continues to support Extended Mail Merge, and encourages reps to transition to this feature.

Mail Merge was an installed feature that let sales reps generate mail merges directly from Microsoft Word.

When Salesforce disables TLS 1.0, we can't guarantee that Mail Merge can establish a connection between Salesforce and Word. Even if reps are able to establish a connection, Salesforce will no longer provide support or maintenance when there is an issue.

Salesforce continues to support Extended Mail Merge, and encourages reps to transition to this feature. Extended Mail Merge is different from Mail Merge because it lets reps generate mail merges from the cloud, and functions no matter which operating systems reps are working from. And because it works from the cloud, reps don't have to install anything to use it.

Extended Mail Merge doesn't create mail merge templates automatically, but reps can create templates in Word manually, upload them to Salesforce, and generate mail merges directly from Salesforce records. Reps can learn how to create templates manually using the "URL to Locate Record Field Names For Mail Merge" article. The article describes how reps can generate a list of Salesforce field labels for reference in their templates.

To get started with Extended Mail Merge, call Salesforce Customer Support to enable the feature for your org.

#### SEE ALSO:

Salesforce Help: Generate Mass Mail Merge Documents with Extended Mail Merge Salesforce Help: Locate Record Field Names for Mail Merge

## Pardot: Make Lead and Contact Syncing Smarter

We've added several features that make syncing with Salesforce better than ever. Now you can control sync behavior for prospect fields, and intelligently merge and delete prospects when their Salesforce records are updated. We've also added the Engage side panel for Gmail, so your sales reps can view details about prospects and add them to nurture programs without leaving their email.

#### IN THIS SECTION:

#### Salesforce Connector: Sync Most Recently Updated Record

Keep your lead and contact records consistent. Control the sync behavior of prospect fields and use the most recently updated record as the master.

### Salesforce Connector: Merge and Delete Prospects Automatically

Track and sync only the prospects that matter. When sales and marketing teams delete or merge Salesforce contacts and leads, Pardot removes their corresponding prospects during the sync process.

### Data Compliance: Specify Cookie Durations

Ensure that your site's cookie duration complies with data retention laws across the globe.

#### Lists: View and Share Segmentation Rule and Dynamic List Previews

Ensure your dynamic lists and segmentation rules target the right prospects. Create and share previews with other Pardot users.

#### Reporting: View Visitor Graphs

Gauge your site's daily page views, new visitors, and top identified companies at a glance.

### Engage for Gmail: Access Prospect Details in Gmail

View email participant details and add prospects to Pardot nurture programs without leaving Gmail.

## Salesforce Connector: Sync Most Recently Updated Record

Keep your lead and contact records consistent. Control the sync behavior of prospect fields and use the most recently updated record as the master.

Previously, prospect fields had either Salesforce or Pardot as the master, forcing reps to make updates in both systems to keep the records consistent.

- 1. From Pardot, click **Admin** > **Configure Fields** > **Prospect Fields**.
- 2. Edit the field.
- **3.** From the **Sync Behavior** drop-down list, select **Use most recently updated record**.

#### SEE ALSO:

Syncing Prospect Field Values with Salesforce

### **EDITIONS**

Available in: Pardot Standard, Pro, and Ultimate Editions.

### **USER PERMISSIONS**

To configure the Pardot Salesforce Connector:

 Pardot Admin or a role that gives access to Connectors: View and Create/Edit

## Salesforce Connector: Merge and Delete Prospects Automatically

Track and sync only the prospects that matter. When sales and marketing teams delete or merge Salesforce contacts and leads, Pardot removes their corresponding prospects during the sync process.

Previously, when marketing and sales teams deleted Salesforce leads or contacts, the corresponding prospects remained in Pardot, counting toward database limits.

This setting does not remove prospects for any corresponding Salesforce records that your teams merged or deleted before you enabled this option.

- 1. From Pardot, click **Admin** > **Connectors**.
- **2.** Click the icon next to the Salesforce connector and then click **Edit**.
- 3. Select Automatically remove prospects if the corresponding records in salesforce.com are deleted or merged.

#### SEE ALSO:

Setting up the Salesforce Connector
Salesforce Connector Optional Settings Reference

## **Data Compliance: Specify Cookie Durations**

Ensure that your site's cookie duration complies with data retention laws across the globe.

Admin users can set the duration of Pardot tracking cookies to durations between 6 months and 10 years. Previously, Pardot's tracking cookie duration was a fixed 10-year duration. This feature lets you control how long Pardot tracking cookies persist in your visitors' browser. The default setting is still 10 years, but now you can change that duration.

When you change the duration, Pardot also updates cookies after visitors interact with Pardot-tracked pages again.

- 1. From Pardot, hover over your email address and click **Settings** > **Edit Account**
- 2. Scroll to **Max Tracking Cookie Duration (days)**. Then specify the number of days your new duration. The minimum is 180 days, and the maximum is 3,650 days.
- 3. Save your changes.

#### SEE ALSO:

Configuring Pardot Max Tracking Cookie Duration How Does Pardot Track Activities?

### **EDITIONS**

Available in: Pardot Standard, Pro, and Ultimate Editions

### **USER PERMISSIONS**

To configure the Pardot Salesforce Connector:

 Pardot Admin or a role that gives access to Connectors: View and Create/Edit

## **EDITIONS**

Available in: Pardot Standard, Pro, and Ultimate Editions

## **USER PERMISSIONS**

To configure the Tracking Cookie Max Duration:

 Pardot Admin or a role that gives access to Account: Edit Settings

## Lists: View and Share Segmentation Rule and Dynamic List Previews

Ensure your dynamic lists and segmentation rules target the right prospects. Create and share previews with other Pardot users.

Marketing users can generate previews for multiple lists or segmentation rules and share them using a unique URL. Previously, you could generate a preview for one list or rule at a time.

#### SEE ALSO:

Segmentation Rules Overview Creating Segmentation Rules Creating Dynamic Lists

# Editions

**USER PERMISSIONS** 

Available in: Pardot

Standard, Pro, and Ultimate

**EDITIONS** 

To create and preview segmentation rules and dynamic lists:

 Pardot Marketing or a role that gives access to Segmentation: View and Create/Edit

## Reporting: View Visitor Graphs

Gauge your site's daily page views, new visitors, and top identified companies at a glance.

## **EDITIONS**

Available in: Pardot Standard, Pro, and Ultimate Editions

## **USER PERMISSIONS**

To view Visitors Reporting:

 Pardot Admin, Marketing, Sales Manager, or a role that gives access to Visitors: View



SEE ALSO:

Visitors Overview

## Engage for Gmail: Access Prospect Details in Gmail

View email participant details and add prospects to Pardot nurture programs without leaving Gmail.

The Engage for Gmail side panel shows you key details about thread participants. Quickly view Pardot score, recent marketing actions, and contact information. Engage for Gmail is only available for Google Chrome.

SEE ALSO:

Engage for Gmail

## EDITIONS

Available in: All Pardot Editions (Standard, Pro, and Ultimate) with Salesforce Engage

# Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

IN THIS SECTION:

### Easily Find Merge Fields for Templates and Emails

When writing an email or creating a template, you can search for merge fields you want to use. Merge fields are available for the User object as well as the item you're working in. This feature is available in Lightning Experience only.

### Get Copies of Email You Send

Do your users need to keep copies of the emails they send? Now they can do that in Lightning Experience. Just let them know they can select Automatic BCC to receive copies in their own inboxes. This feature is available in both Lightning Experience and Salesforce Classic.

### Get Mass Email Opt-Out and Bounce Indicators Before You Send

Users can easily find out whether email recipients have opted out of receiving mass emails or emails to a recipient have bounced before. We let them know with an indicator when they add the recipient's name in the **To** field. This feature is available in both Lightning Experience and Salesforce Classic.

### Unresolved Items: Available in Lightning Experience

When Salesforce sends email items it couldn't assign to records to the Unresolved Items queue, reps can manage those items directly from Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

### Leads: Update Details for Converted Leads in Salesforce Classic

Report on and audit converted leads with accuracy. Sales teammates with special privileges can now update fields and picklist values for leads already converted. This feature is available in Salesforce Classic only.

### Permission Required to Edit Contract Settings

You must have the "Customize Application" permission to edit contract settings. The permission required to administer contract settings is now consistent with other objects.

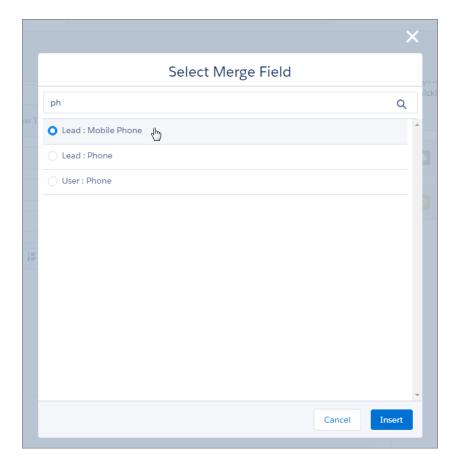
### Data Import Wizard: Import Data from Some Object Home Pages

Sales reps now save time and clicks when they access the Data Import Wizard directly from certain sales objects home pages. This feature is available in Lightning Experience only.

## Easily Find Merge Fields for Templates and Emails

When writing an email or creating a template, you can search for merge fields you want to use. Merge fields are available for the User object as well as the item you're working in. This feature is available in Lightning Experience only.

The first result is selected by default. Just click **Insert** to add the field to your template or email.



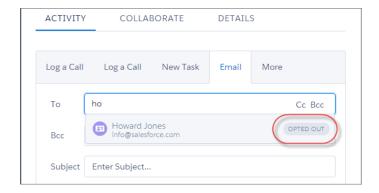
## Get Copies of Email You Send

Do your users need to keep copies of the emails they send? Now they can do that in Lightning Experience. Just let them know they can select Automatic BCC to receive copies in their own inboxes. This feature is available in both Lightning Experience and Salesforce Classic. Users select Automatic BCC by going to My Email Settings.

## Get Mass Email Opt-Out and Bounce Indicators Before You Send

Users can easily find out whether email recipients have opted out of receiving mass emails or emails to a recipient have bounced before. We let them know with an indicator when they add the recipient's name in the **To** field. This feature is available in both Lightning Experience and Salesforce Classic.

Contact, lead, and person account records include an Email Opt Out field. If that field is selected on a record and your user adds that recipient to their email, we'll show the indicator. Bounce alerts appear in the same spot. Bounce indicators are not available for contacts and leads.



## Unresolved Items: Available in Lightning Experience

When Salesforce sends email items it couldn't assign to records to the Unresolved Items queue, reps can manage those items directly from Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

Unresolved Items helps reps manage items they've added to Salesforce using Salesforce App for Outlook, Exchange Sync, Salesforce for Outlook, or Email to Salesforce.

Reps can access Unresolved Items in Lightning Experience from the top of any page by clicking their avatar, and then clicking **Settings** > **Email** > **Unresolved Items**.

## Leads: Update Details for Converted Leads in Salesforce Classic

Report on and audit converted leads with accuracy. Sales teammates with special privileges can now update fields and picklist values for leads already converted. This feature is available in Salesforce Classic only.

- 1. From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**.
- 2. Select Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions.
- 3. Save your changes.
- **4.** Add the setting to your profiles. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**. Select the profile and then select Set Audit Fields upon Record Creation.
- 5. Save your changes.

## USER PERMISSIONS

To update converted leads:

"Set Audit Fields upon Record Creation"

**AND** 

"Update Records with Inactive Owners"

## Permission Required to Edit Contract Settings

You must have the "Customize Application" permission to edit contract settings. The permission required to administer contract settings is now consistent with other objects.

## Data Import Wizard: Import Data from Some Object Home Pages

Sales reps now save time and clicks when they access the Data Import Wizard directly from certain sales objects home pages. This feature is available in Lightning Experience only.

Access the Data Import Wizard from these home pages.

- Accounts
- Contacts
- Leads
- Custom Objects
- Person Accounts



# **Analytics**

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

### IN THIS SECTION:

### Reports and Dashboards: Analyze Your Data in Lightning Experience

A whole slew of new features gives Lightning Experience Reports and Dashboards more parity with their Salesforce Classic counterparts. Switch to Lightning Experience, then filter your dashboards, view them as someone else, and read tabular data. Show or hide details of matrix reports, which are now fully supported. Change the color of your charts, and set reference lines. Run, edit, or delete reports and dashboards directly from list views.

### Wave Analytics: Take Data Analysis to the Next Level

Enrich your datasets with computed fields and build dashboards more easily and quickly. The new flex dashboard designer comes with layout templates, new chart types, and tools to build visualizations based on custom SAQL queries and calculated fields in compare tables.

## Reports and Dashboards: Analyze Your Data in Lightning Experience

A whole slew of new features gives Lightning Experience Reports and Dashboards more parity with their Salesforce Classic counterparts. Switch to Lightning Experience, then filter your dashboards, view them as someone else, and read tabular data. Show or hide details of matrix reports, which are now fully supported. Change the color of your charts, and set reference lines. Run, edit, or delete reports and dashboards directly from list views.



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



#### IN THIS SECTION:

### Show Details in Matrix Reports in Lightning Experience

Show and hide details when running matrix reports in Lightning Experience, just like you can in Salesforce Classic.

### Filter Dashboards in Lightning Experience

Dashboard filters are now available while viewing dashboards in both Salesforce Classic and Lightning Experience.

### View Dynamic Dashboards as Other Users in Lightning Experience

You can now view dynamic dashboards as other users in both Salesforce Classic and Lightning Experience.

### View Tables on Dashboards in Lightning Experience

Now you can view tables on dashboards in both Salesforce Classic and Lightning Experience. Previously, tables displayed as bar charts on Lightning Experience dashboards.

### Improvements to the Reports and Dashboards Home Pages in Lightning Experience

We've redesigned your report and dashboard home pages in small but helpful ways to make it easier to find, edit, and organize your reports, dashboards, and folders.

### More Options for Charts in Lightning Experience

Lightning Experience charts are more widely available throughout Salesforce, and the chart editor offers more customization options.

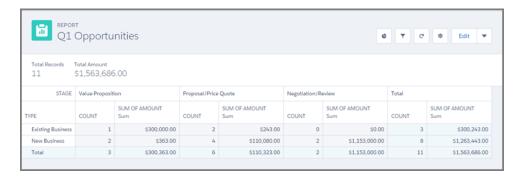
### Manage Everyone's Reports and Dashboards

Use the allPrivate query scope to find and delete reports and dashboards saved in private folders. Requires the user permission "Manage All Private Reports and Dashboards."

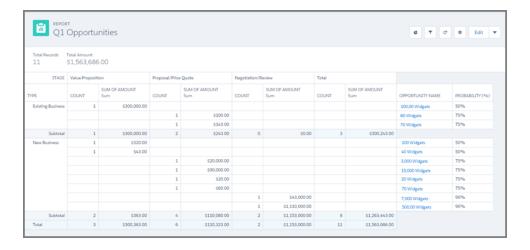
## Show Details in Matrix Reports in Lightning Experience

Show and hide details when running matrix reports in Lightning Experience, just like you can in Salesforce Classic.

Previously, matrix reports always hid details in Lightning Experience. Matrix reports with details hidden are useful for showing overviews of data summarized along multiple axes. This opportunity matrix report has details hidden:



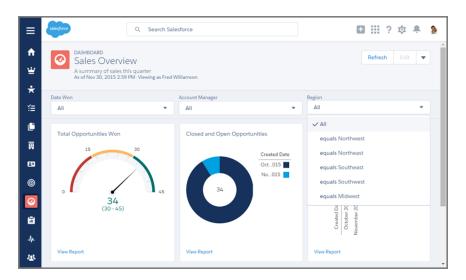
Now, in Lightning Experience, click , and show details of the report. With details shown, matrix reports display all report data while maintaining row and column groupings.



## Filter Dashboards in Lightning Experience

Dashboard filters are now available while viewing dashboards in both Salesforce Classic and Lightning Experience.

Your Sales Overview dashboard effectively summarizes your sales team's accomplishments, but what if dashboard readers only want to know how things are going in the southwest? Add a *region* filter, and enable folks to scope the dashboard so that it only shows data that they need.



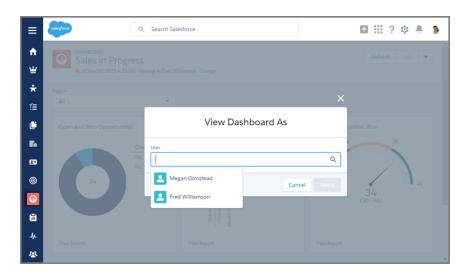
In Lightning Experience you can apply or clear dashboard filters created in Salesforce Classic. To add or remove filters — or edit, clone, or delete filtered dashboards — switch to Salesforce Classic.

When you drill into a report from a filtered dashboard in Lightning Experience, the report isn't filtered. In Salesforce Classic, when you drill into a report from a filtered dashboard, the report is filtered in the same way as the dashboard.

## View Dynamic Dashboards as Other Users in Lightning Experience

You can now view dynamic dashboards as other users in both Salesforce Classic and Lightning Experience.

Maybe you're a sales team leader who wants to show team members a big-picture sales overview dashboard, but they don't have the requisite data access permissions. Maybe you're a regional sales manager trying to see account manager hiring details, but you're not in HR and don't have access. Whatever the case, viewing a dashboard as someone else enables you and your teams to get the insights you need. When you view the dashboard as another user, data in the dashboard is shown according to that user's level of data access. Elsewhere in Salesforce, your data access permissions are unchanged.



To allow dashboard readers to view your dashboard as another user, switch to Salesforce Classic and perform two tasks. First, set up your dashboard so that it runs as the logged-in user. Then allow authorized users to change the running user. Thereafter, users with the "View My Team's Dashboards" or "View All Data" permission will be able to view your dashboard as someone else.

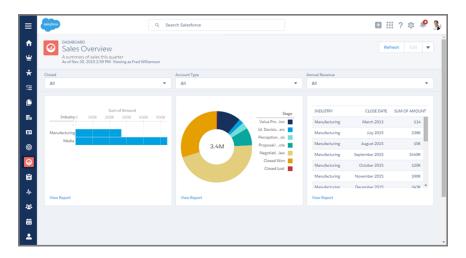
To edit, clone, or delete dynamic dashboards, switch to Salesforce Classic.

For more information about viewing dashboards as other users, see "Set Up Dynamic Dashboards" in the Salesforce help.

## View Tables on Dashboards in Lightning Experience

Now you can view tables on dashboards in both Salesforce Classic and Lightning Experience. Previously, tables displayed as bar charts on Lightning Experience dashboards.

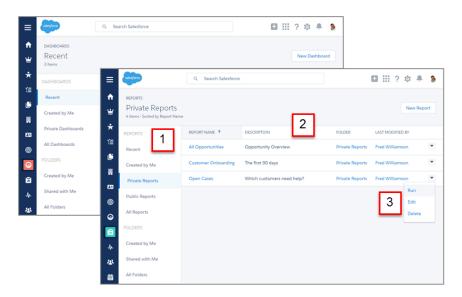
Tables are useful for presenting information in an easy to scan format. Charts give dashboard readers information at a glance, and tables give more details. Add a table to your dashboard and use it as a leader board to encourage healthy competition on your sales team!



To show tables in your Lightning Experience dashboard, switch to Salesforce Classic, edit your dashboard, and add a table component.

## Improvements to the Reports and Dashboards Home Pages in Lightning Experience

We've redesigned your report and dashboard home pages in small but helpful ways to make it easier to find, edit, and organize your reports, dashboards, and folders.



### Parse Through Your Reports, Dashboards, and Folders with New Filters (1)

We've redesigned the filter pane, renamed a few filters, and added two new filters.

Renamed report and dashboard filters:

- Recent Reports and Recent Dashboards are now Recent.
- Reports I Created and Dashboards I Created are now Created by Me.

New folder filters:

- Created by Me
- Shared with Me

### Identify Which Report is Which with the *Description* Field (2)

The *Description* field surfaces your descriptions of reports and dashboards. To make room for the *Description* field, we've removed the *Created By* field.

### Run, Edit, or Delete Reports and Dashboards from List Views (3)

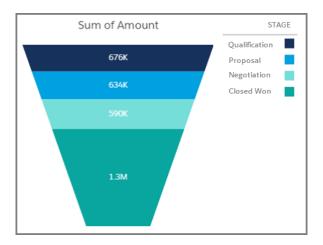
No longer do you have to open a report before editing or deleting it. Click 💌 to run, edit, or delete your reports and dashboards. These actions are available in all report and dashboard list views.

# More Options for Charts in Lightning Experience

Lightning Experience charts are more widely available throughout Salesforce, and the chart editor offers more customization options.

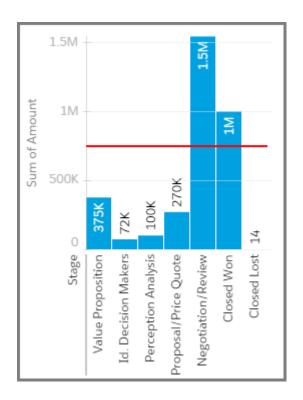
### **Funnel Charts Available on Reports (but Not Dashboards)**

Use a funnel chart when you have multiple groupings in an ordered set and want to show the proportions among them. Funnel charts are ideal for showing the stages of your opportunities.



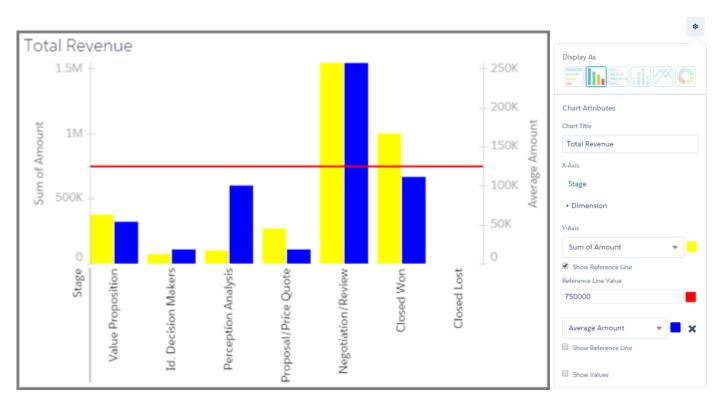
### **Add Reference Lines to Report Charts**

Reference lines help highlight specific values on your chart. To add a reference line to your chart, open the chart editor, click **Show reference line**, and enter a reference line value. Optionally, change the color of your reference line. Reference lines are available on report charts, but not in dashboard components. You can add reference lines to bar, column, and line charts, but not donut and funnel charts.



### **Change the Color of Your Report Charts**

Give your charts a personal touch and highlight important details by customizing the color of chart elements, like bars, slices, and reference lines. You can't change the color of charts in dashboard components.



### View Enhanced Charts in the Lightning App Builder, Visualforce Pages, and Page Layout Editor

We've made the beautiful, interactive Lightning Experience charts more widely available across Salesforce. Check out Lightning Experience charts in:

- Salesforce1
- Visualforce Pages
- The Page Layout Editor
- The Lightning App Builder

## Manage Everyone's Reports and Dashboards

Use the allPrivate query scope to find and delete reports and dashboards saved in private folders. Requires the user permission "Manage All Private Reports and Dashboards."

Over time, reports and dashboards fall out of use, or users become inactive and leave behind obsolete reports and dashboards in their private folders. Previously, there was no convenient way to delete reports and dashboards saved in users' private folders. Now, log in to Workbench and run a query to return reports saved in users' private folders which haven't been run for more than a year:

SELECT Id FROM Report USING SCOPE allPrivate WHERE LastRunDate < LAST N DAYS:365

You can also query reports saved inside a specific user's private folder:

SELECT Id FROM Report USING SCOPE allPrivate WHERE OwnerId = '005A0000000Bc2deFG'

Export the returned list of Report Id's to a CSV file, then click **data** > **Delete** in workbench and upload your CSV file. Click **Map Fields** to map the Id Field to the CSV Field of the same name. Leave **Permanently hard delete records** and **Process records asynchronously via Bulk API** deselected, then click **Confirm Delete**. The reports listed in your CSV are moved into your Salesforce Recycle Bin.

## Wave Analytics: Take Data Analysis to the Next Level

Enrich your datasets with computed fields and build dashboards more easily and quickly. The new flex dashboard designer comes with layout templates, new chart types, and tools to build visualizations based on custom SAQL queries and calculated fields in compare tables.

## EDITIONS

Available in: **Developer** Edition

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



### IN THIS SECTION:

#### Integrate Data

Add derived fields to a dataset to add additional information that can be computed from existing data, but not extracted from the data source. With replication enabled, you can also build multiple dataflows to create datasets independently.

### Sales Wave Analytics App

In response to customer needs, we regularly add functionality and dashboards to the Sales Wave prebuilt app to make it even easier to explore your sales data.

### Explore, Visualize, and Design

Design professional-looking dashboards with the new flex dashboard designer and layout templates. Explore and visualize your data in powerful new ways by using the new SAQL Editor, drag-and-drop chart setup, and the new chart types.

### Extend the Power of Wave with Communities and New Actions

Bring Wave Analytics together with the rest of your Salesforce experience by sharing your visualizations through Communities—now generally available—and accessing additional Salesforce actions from custom menus in Wave lenses and dashboards.

### Experience Wave Mobile with the Latest iOS Features

Version 2.1 includes the triple-group stacked bar chart, waterfall chart, and support for Spotlight and 3D Touch.

### Develop with the Wave REST API

The Wave REST API has expanded with new endpoints to give you access to dashboards, new representations for Extended Metadata, and more.

### Build Powerful Queries Using SAQL

Use the new functions in the Salesforce Analytics Query Language (SAQL) to perform windowing functions on your data, and more.

## Integrate Data

Add derived fields to a dataset to add additional information that can be computed from existing data, but not extracted from the data source. With replication enabled, you can also build multiple dataflows to create datasets independently.

### IN THIS SECTION:

### Enrich Your Datasets with Derived Fields

Derived fields let you add more information to a dataset than what is extracted from a data source. For example, add a derived field that categorizes your opportunities into Small, Medium, and Large based on the extracted opportunity amount. Use derived fields to add more context to the data, create groupings, and perform calculations in advance.

### Create Multiple Dataflows with Replication (Pilot)

With the Wave Analytics Platform license and replication enabled, you can now build multiple dataflows for different purposes and run them on their own schedules. You can break up a large dataflow into smaller, independent ones to build datasets faster. In addition, you can delete unnecessary dataflows and disable them to temporarily prevent them from running on the schedule.

### Creating Datasets With Wave Connector for Excel No Longer Requires Special Admin Setup

We've made it easier than ever to use the Salesforce Wave Connector to import data from Microsoft Excel.

### Enrich Your Datasets with Derived Fields

Derived fields let you add more information to a dataset than what is extracted from a data source. For example, add a derived field that categorizes your opportunities into Small, Medium, and Large based on the extracted opportunity amount. Use derived fields to add more context to the data, create groupings, and perform calculations in advance.

Derived fields in a dataset behave just like other fields that are extracted from an input data source—you can query them, filter by them, and group by them. The benefit of generating values in derived fields instead of a query is that the values are immediately available to all users who have access to the dataset. In addition, it saves users time trying to create the queries.

You can add the following transformations to a dataflow to create derived fields.

### computeExpression

Performs calculations based on fields within the same row of the dataset. You can assign a value to the field based on the value of another field, concatenate multiple text fields, or perform mathematical calculations on numeric fields. For example, you can categorize opportunities based on their amount.

When you define a derived field in the dataflow, you specify the field name, type, and SAQL expression used to calculate its value. The expression can be based on one or more fields from the input data or from other derived fields.

### computeRelative

Performs calculations based on the same field in other rows in the dataset. You can calculate the first, previous, current, and next values of a field to determine the changes in value. For example, to analyze sales pipeline trends, you can calculate the changes in the opportunity amount throughout the stages of each opportunity.

When you define a computeRelative transformation, you specify an sfdcDigest transformation as the input, partition the records, and sort the records within each partition. For example, you can use sfdcDigest to extract opportunity history records, and then use computeRelative to calculate changes in each opportunity over time. You can partition opportunity records by opportunity ID, and then chronologically sort records within each partition to correctly identify the previous and next values.

You must specify the computeRelative transformation directly after the associated sfdcDigest transformation in the dataflow JSON. Because Wave merges the logic from computeRelative into the associated sfdcDigest, apply sfdcRegister on sfdcDigest to add the fields from both transformations to the dataset.



**Note**: You can use this transformation in a replication dataflow. For more information about replication, see Getting Started with Wave Replication.

### computeExpression Transformation Example

Let's look at an example where you group your opportunities into Small, Medium, and Large categories based on amount. First, create an Opportunity dataset by using an sfdcDigest transformation to extract the opportunity name and amount from the Opportunity object.

Next, use the computeExpression transformation to add the Opportunity Size derived field to the Opportunity dataset based on the following rules.

- If Amount < \$10,000, Opportunity Size = Small
- If Amount >=\$10,000 and < \$50,000, Opportunity Size = Medium
- If Amount >=\$50,000, Opportunity Size = Large

To create the derived field, add the following computeExpression transformation to the dataflow.

```
"Create Opportunity Size Derived Field": {
   "action": "computeExpression",
   "parameters": {
      "source": "Opportunity Data",
      "mergeWithSource": true,
      "computedFields": [
         {
            "name": "Size",
            "type": "Text",
            "label": "Opportunity Size"
            "saglExpression":
               "case
                  when Amount < 10000 then \"Small\"
                  when Amount >= 10000 and Amount < 50000 then \"Medium\"
                  else \"Large\"
               end"}
      ]
   }
```

With the new Opportunity Size field, the Opportunity dataset looks like this:

Opportunity Name	Amount	<b>Opportunity Size</b>
ABC Motors	\$11,000	Medium
Trend Parts	\$150,000	Large
Salvage My Car	\$40,000	Medium
Local Trucks	\$3,000	Small

### computeRelative Transformation Example

Let's look at an example where you want to analyze your sales pipeline. To start, add an sfdcDigest transformation to extract the following data from the OpportunityHistory object.

OpportunityHistory Object					
OpportunityId	CreatedDate	StageName	Amount	CloseDate	
00630000003JrH6AAK	2005-11-23T20:24:09.000Z	Closed Won	36938	11/15/2005	
00630000003SYADAA4	2005-11-08T18:47:18.000Z	Present/Demo/Quote	4200	12/3/2005	
00630000003Yx9BAAS	2005-11-23T01:06:57.000Z	Present/Demo/Quote	71500	11/30/2005	
00630000003JsMcAAK	2005-10-28T18:12:06.000Z	Negotiation/Review	18750	11/15/2005	
00630000003Yx9BAAS	2005-11-25T18:03:46.000Z	Closed Won	5832	11/23/2005	
00630000003Yx9BAAS	2005-11-23T01:07:46.000Z	Present/Demo/Quote	7128	11/30/2005	
00630000003JrH6AAK	2005-11-03T21:53:36.000Z	Negotiation/Review	20148	11/15/2005	
00630000003SZAZAA4	2005-11-08T19:44:27.000Z	Present/Demo/Quote	141120	12/16/2005	
00630000003JrH6AAK	2005-10-17T22:28:33.000Z	Present/Demo/Quote	42900	11/15/2005	
00630000003JsMcAAK	2005-10-17T23:30:20.000Z	Negotiation/Review	18750	10/31/2005	
00630000003OG95AAG	2005-10-28T17:45:30.000Z	Present/Demo/Quote	52000	11/30/2005	

Next, add a computeRelative transformation to perform the following tasks.

- Partition the extracted records by opportunity ID.
- Within each partition, sort the extracted records by CreatedDate in ascending order. Sorting by CreatedDate ensures that the changes that occur for each opportunity are listed in chronological order.
- Add the following derived fields to the final dataset.

### OpportunityCreatedDate

Determines the date that the opportunity was first created. You can use this date with the actual close date to determine the number of days required to close the sale. The goal is to shorten the sales cycle to recognize revenue.

#### ValidToDate

Determines the date to which the state of the opportunity is valid. You can use this field to determine the time period for which the opportunity details are valid in each record.

#### **AmountPrev**

Determines the previous amount of the opportunity. You can use this field to determine if the values of opportunities are increasing or decreasing, which can affect whether you hit your sales targets.

#### CloseDatePrev

Determines the previous expected close date for the opportunity. You can use this field to analyze how the expected close date changes over the sales cycle of the opportunity. If the expected close date keeps getting pushed out, identify the issues that are causing the longer sales cycle.

To build the final dataset with extracted fields from sfdcDigest and derived fields from computeRelative, add an sfdcRegister transformation with sfdcDigest as the input source.

You create the following dataflow.

```
}
"computeTrending": {
    "action": "computeRelative",
    "parameters": {
        "partitionBy": ["OpportunityId"],
        "orderBy": [
                "name": "CreatedDate",
                "direction": "asc"
        ],
        "computedFields": [
            {
                "name": "OpportunityCreatedDate",
                "expression": {
                    "sourceField": "CreatedDate",
                    "offset": "first()",
                    "default": "current()"
                }
            },
                "name": "ValidToDate",
                "expression": {
                    "sourceField": "CreatedDate",
                    "offset": "next()",
                    "default": "3000-01-01T00:00:00.000Z"
                }
            },
                "name": "AmountPrev",
                "expression": {
                    "sourceField": "Amount",
                    "offset": "previous()",
                    "default": "0"
                }
            },
                "name": "CloseDatePrev",
                "expression": {
                    "sourceField": "CloseDate",
                    "offset": "previous()",
                    "default": "01/01/1970"
                }
        ],
        "source": "extractOppHistory"
    }
"Register_OppportunityHistory_Dataset": {
    "action": "sfdcRegister",
    "parameters": {
        "alias": "SalesPipelineTrending",
```

After you run the dataflow, the final dataset looks like this.

Sales Pipeline Trending Dataset								
Opportunityld	CreatedDate	StageName	Amount	CloseDate	OpportunityCreatedDate	ValidToDate	AmountPrev	CloseDatePrev
00630000003JrH6AAK	2005-10-17T22:28:33.000Z	Present/Demo/Quote	429000	11/15/2005	2005-10-17T22:28:33.000Z	2005-11-03T21:53:36.000Z	0	1/1/1970
00630000003JrH6AAK	2005-11-03T21:53:36.000Z	Negotiation/Review	201480	11/15/2005	2005-10-17T22:28:33.000Z	2005-11-23T20:24:09.000Z	429000	11/15/2005
00630000003JrH6AAK	2005-11-23T20:24:09.000Z	Closed Won	369380	11/15/2005	2005-10-17T22:28:33.000Z	3000-01-01T00:00:00.000Z	201480	11/15/2005
00630000003JsMcAAK	2005-10-17T23:30:20.000Z	Negotiation/Review	187500	10/31/2005	2005-10-17T23:30:20.000Z	2005-10-28T18:12:06.000Z	0	1/1/1970
00630000003JsMcAAK	2005-10-28T18:12:06.000Z	Negotiation/Review	187500	11/15/2005	2005-10-17T23:30:20.000Z	3000-01-01T00:00:00.000Z	187500	10/31/2005
00630000003OG95AAG	2005-10-28T17:45:30.000Z	Present/Demo/Quote	520000	11/30/2005	2005-10-28T17:45:30.000Z	3000-01-01T00:00:00.000Z	0	1/1/1970
00630000003SYADAA4	2005-11-08T18:47:18.000Z	Present/Demo/Quote	42000	12/3/2005	2005-11-08T18:47:18.000Z	3000-01-01T00:00:00.000Z	0	1/1/1970
00630000003SZAZAA4	2005-11-08T19:44:27.000Z	Present/Demo/Quote	1411200	12/16/2005	2005-11-08T19:44:27.000Z	3000-01-01T00:00:00.000Z	0	1/1/1970
00630000003Yx9BAAS	2005-11-23T01:06:57.000Z	Present/Demo/Quote	715000	11/30/2005	2005-11-23T01:06:57.000Z	2005-11-23T01:07:46.000Z	0	1/1/1970
00630000003Yx9BAAS	2005-11-23T01:07:46.000Z	Present/Demo/Quote	71280	11/30/2005	2005-11-23T01:06:57.000Z	2005-11-25T18:03:46.000Z	715000	11/30/2005
00630000003Yx9BAAS	2005-11-25T18:03:46.000Z	Closed Won	58320	11/23/2005	2005-11-23T01:06:57.000Z	3000-01-01T00:00:00.000Z	71280	11/30/2005

Notice that Wave partitions the records by opportunity ID and then sorts the records in ascending order within each partition, based on the CreatedDate field. Wave uses the sort order within each partition to calculate the derived field values.

You can use the final dataset to determine changes to a field values. For example, you can calculate the difference between the Amount and AmountPrev fields to determine the changes in opportunity amounts.

### Create Multiple Dataflows with Replication (Pilot)

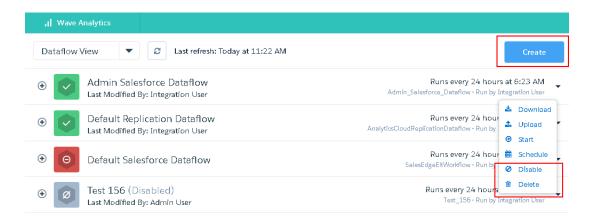
With the Wave Analytics Platform license and replication enabled, you can now build multiple dataflows for different purposes and run them on their own schedules. You can break up a large dataflow into smaller, independent ones to build datasets faster. In addition, you can delete unnecessary dataflows and disable them to temporarily prevent them from running on the schedule.

You can perform these actions in the Dataflow View of the data monitor.

### **USER PERMISSIONS**

To create, disable, or delete a dataflow:

 "Edit Wave Analytics Dataflows"



When you create a dataflow, it's disabled by default. Manually start it to enable it and run it on the specified schedule. You can't delete the default or replication dataflows, but you can disable them.

With the Wave Analytics Platform license, your org can have up to 10 user dataflows, including the default user dataflow, and one replication dataflow.



**Note**: You can't create multiple user dataflows if you have the Analytics Cloud - Sales Wave Analytics App license—you can use only the default user dataflow.

The replication feature is available as a pilot. For more information about replication, see the Getting Started with Wave Replication Tipsheet.

### Creating Datasets With Wave Connector for Excel No Longer Requires Special Admin Setup

We've made it easier than ever to use the Salesforce Wave Connector to import data from Microsoft Excel.

The new version of the Wave Connector app for Excel 2013 doesn't require your Salesforce administrator to undertake any special setup tasks. Some customers using the previous release had to add a URL to the CORS whitelist or set up a private app catalog. The latest version should work as is when you download the app, with no additional setup.

The Connector is available from the Apps for Office store. For more details, see *Install the Wave Connector Excel App* in Salesforce Help.

## USER PERMISSIONS

To create, disable, or delete a dataflow:

 "Upload External Data to Analytics Cloud"

## Sales Wave Analytics App

In response to customer needs, we regularly add functionality and dashboards to the Sales Wave prebuilt app to make it even easier to explore your sales data.

#### IN THIS SECTION:

Better Organized Sales Wave Configuration Wizard Now Lets You Control Security Settings

The app configuration wizard, now organized into four pages, lets you choose whether to apply security settings using role-level hierarchy.

Pipe Activity and Account Summary Dashboards Added to Sales Wave App

Gain even more insights into your Salesforce data from Sales Wave through with two new prebuilt dashboards.

App Setup Dashboard Tracks Your Configuration Wizard Selections

A new Sales Wave app dashboard records the answers you select when you use the built-in configuration wizard to create the app.

## Better Organized Sales Wave Configuration Wizard Now Lets You Control Security Settings

The app configuration wizard, now organized into four pages, lets you choose whether to apply security settings using role-level hierarchy.

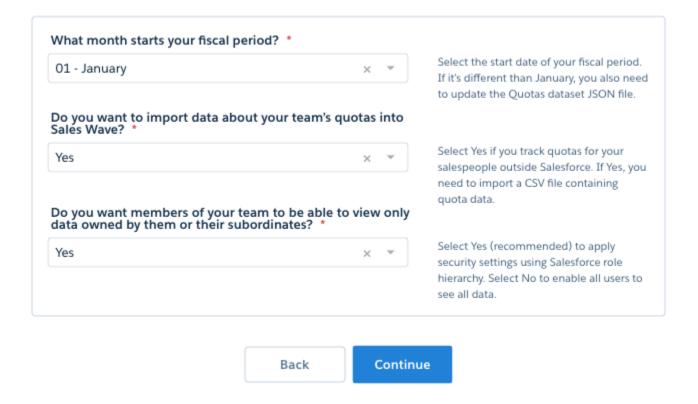
We've added the following question to the Sales Wave Analytics app configuration wizard: "Do you want members of your team to be able to view only data owned by them or their subordinates?" By answering "yes," you apply security settings according to your Salesforce org's role-level hierarchy, which restricts access to data. If you say "no," all Sales Wave users can view all the data available through the app.

Also, we've reorganized the wizard to make it easier to use. Wizard questions are now divided into four pages, as follows:

- Page 1: Questions about the Accounts object
- Page 2: Questions about the Opportunities object
- Page 3: Questions about the Products object
- Page 4: Questions about fiscal start date, quotas data, and security

## Personalize Sales Wave Analytics - General





### Pipe Activity and Account Summary Dashboards Added to Sales Wave App

Gain even more insights into your Salesforce data from Sales Wave through with two new prebuilt dashboards.

Sales Wave customers have asked for additional functionality, and we've obliged by adding two new prebuilt dashboards to the app:

- Pipe Activity (partial view shown below), which you can use to benchmark open versus won deals to help determine best practices for accelerating deals.
- Account Summary, which summarizes an account's average win rate, average sale cycle, and open and won totals.

If you're already using Sales Wave, you need to create a new version of the app to use the new dashboards.



### App Setup Dashboard Tracks Your Configuration Wizard Selections

A new Sales Wave app dashboard records the answers you select when you use the built-in configuration wizard to create the app.

Sales Wave customers typically create and delete the app several times until the app meets their organization's needs. That process just got easier thanks to the new Personalized App Setup dashboard. The new dashboard, which is created along with the app, records the values you select when you answer the configuration wizard questions. It also records the version number you used.

If you're already using Sales Wave, you need to create a version of the app using the latest version to view the dashboard.

### Personalize Sales Wave Analytics

Patch Version: 200.8

CONFIGURATION QUESTION	CONFIGURATION	DESCRIPTION
Account (1 of 3)		
1) What is the first field you want to use to segment your customers?	Туре	Your choice determines the first-level grouping of customer data displayed in Sales Wave dashboards.
2) What is the second field you want to use to segment your customers?	Industry	Your choice determines the second-level grouping of customer data displayed in Sales Wave dishboards.
3)What is the first field you want to use to segment your geographies?	Billing Country	Your choice determines the first-level grouping of data about geographies displayed in Sales Wave dashboards.
What is the second field you want to use to segment your geographies?	Billing State/Province	Your choice determines the second-level grouping of data about geographies displayed in Sales Wave dashboards.
5) What is the field from the Accounts object you want to use to segment your sources for finding new business?	Account Source	Your choice determines the second-level grouping of data about geographies displayed in Sales Wave dashboards.

## Explore, Visualize, and Design

Design professional-looking dashboards with the new flex dashboard designer and layout templates. Explore and visualize your data in powerful new ways by using the new SAQL Editor, drag-and-drop chart setup, and the new chart types.

### IN THIS SECTION:

Quickly Build Responsive Grid-Based Dashboards with Flex Dashboard Designer (Beta)

The new dashboard designer offers unique features, such as drag-and-drop and snap-to-grid, that allow you to quickly create visually aesthetic dashboards. The designer is beta for Spring '16.

### Customize Lenses and Dashboards More Easily with Integrated Tools

New tools integrated into the interface give you easy access to the SAQL and JSON behind your lenses and dashboards. And now you can create lenses within the flex dashboard designer, using an integrated SAQL editor and a new drag-and-drop way to set up visualizations.

### Make Your Dashboards More Interactive with Auto-Faceted SAQL Query Lenses

You can now enable filters from compact-form query lenses and Scope widgets to be automatically applied to SAQL query lenses. For example, if you select a product in a widget in a dashboard, that product filter can also be applied to a widget built on a SAQL query lens.

### Take Out the Guesswork When Designing a Dashboard Layout

Create more professional-looking dashboards using layout templates provided with Wave. The layouts are based on design best practices. The preconfigured layout templates let you focus more on the dashboard content and less on the layout design.

### Quickly Get Up to Speed with Dashboard JSON Changes

Some dashboard JSON property names and values changed to make them easier to understand. When you save your dashboard, Wave updates them in the JSON for you. In addition, you can now apply new properties to widgets.

### Expand Your Visualization Capabilities with New Chart Types

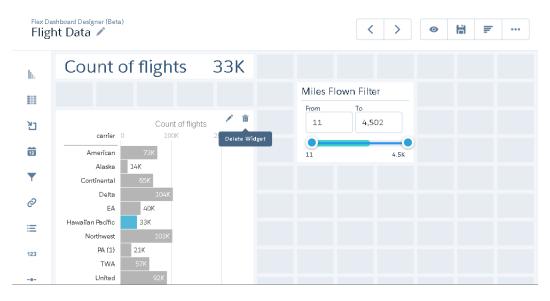
Three new chart types give you more choice and control when you create Wave visualizations to help you answer questions about your business.

### Additional Interface Changes to Improve the Wave Experience

New graphical elements, revised icons, keyboard shortcuts, and more.

### Quickly Build Responsive Grid-Based Dashboards with Flex Dashboard Designer (Beta)

The new dashboard designer offers unique features, such as drag-and-drop and snap-to-grid, that allow you to quickly create visually aesthetic dashboards. The designer is beta for Spring '16.

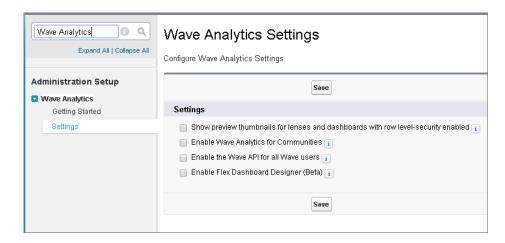


You can now take advantage of the following features when creating a dashboard in the new designer. Use the drag-and-drop feature to quickly create widgets in the dashboard. The snap-to-grid feature perfectly aligns widgets. To increase your workspace, hide clipped lenses and property panels. If you resize your browser while viewing a dashboard, the column widths automatically adjust relative to each other.

### Give Users Access to the Flex Dashboard Designer

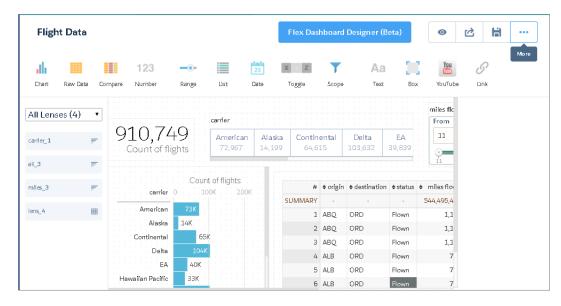
Enable the feature and then grant users access to the new designer.

1. From Setup, enter Wave Analytics in the Quick Find box, then select **Settings**.



- 2. Select Enable Flex Dashboard Designer (Beta) and click Save.
- 3. To grant users access to the new designer, assign the "Create and Edit Wave Analytics Dashboards" user permission.

Users can choose to use the new designer when creating or editing dashboards. If a user chooses not to open an existing dashboard in the new designer, the user can do it later by clicking the **Flex Dashboard Designer (Beta)** button when editing the dashboard.



The first time a user opens an existing dashboard in the new designer, Wave makes a copy of the dashboard for the new designer. Because of the new grid, widgets can shift in the designer canvas. If needed, realign them—the snap-to-grid feature makes it quick and easy. The user can then save the dashboard.

**2** 

Note: After you convert a dashboard to the new designer, you can't open it in the original designer.

### Differences Between the Original and New Designers

Consider the following differences between the original and new designers.

- In the new designer, click the Create New Lens button in a dashboard to add a lens to the dashboard.
- In the new designer, use snap-to-grid to quickly align and resize widgets.
- In the new designer, hide clipped lenses and properties to give you more workspace when designing a dashboard.
- The YouTube widget is deprecated in the new designer. If you open an existing dashboard in the new designer, the YouTube widget is removed from the dashboard. If needed, you can use a Link widget to link to a YouTube video.
- The Container widget in the new designer replaces the Box widget in the original designer. You can add a background image to the Container widget, like the Box widget. The Container widget extends the behavior of the Box widget by enabling you to group widgets within the container and move them all at once. If you open an existing dashboard in the new designer, the Box widget is removed from the dashboard. If needed, you can add a Container widget.
- The new designer doesn't currently support the following chart types.
  - Calendar heat map
  - Dot plot (horizontal or vertical)
  - Heat map
  - Matrix
  - Parallel coordinates
  - Pivot table

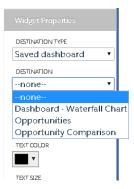
You can clip these chart types to a dashboard or add them to the dashboard JSON. However, the new designer converts each unsupported chart to a horizontal bar chart, except for the pivot table, which converts to a compare table.

- Widgets in the new designer can't overlap, except for a widget inside a Container widget.
- To add a widget in the new designer, drag it onto the canvas and then drop the clipped lens on top.
- When you create or save a dashboard in the new designer, the dashboard JSON contains a new gridLayouts section. The section defines the dashboard layout in web browsers on desktop and laptop computers, but not on mobile devices. For more information, see gridLayouts.
- The Flex Dashboard Designer (Beta) doesn't support mobile layouts. Wave Analytics for iOS has Beta support for dashboards created or saved in the Flex Dashboard Designer.

### Changes When Adding a Link Widget to a Dashboard

As of Spring '16, the Destination picklist field in a Link widget shows only the 25 most recently opened assets. If you create a Link widget in a dashboard that's not saved in Spring '16, you might not find some linked assets in the picklist. If you can't find an asset in the original designer, open the asset first, and then look for the asset in the picklist. If you are using the new designer, manually enter the name of the asset in the Destination field.

Here's a sample picklist for a Link widget when linking to a saved dashboard.



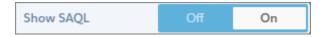
### Customize Lenses and Dashboards More Easily with Integrated Tools

New tools integrated into the interface give you easy access to the SAQL and JSON behind your lenses and dashboards. And now you can create lenses within the flex dashboard designer, using an integrated SAQL editor and a new drag-and-drop way to set up visualizations.

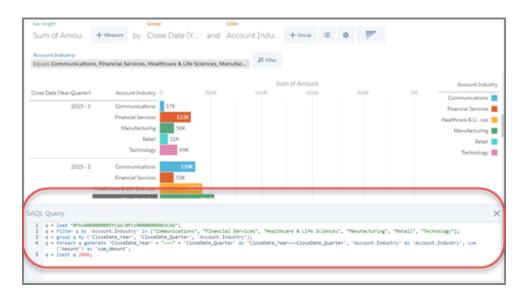
### View SAQL as You Explore

Wave Analytics uses Salesforce Analytics Query Language (SAQL) behind the scenes in lenses and dashboards to gather data for visualizations. Now you can view the underlying SAQL query being written as you explore.

In the explorer, click the Options menu oto access the **Show SAQL** control.



Select **On** to open the SAQL viewer. The SAQL Query updates as you explore, and you can copy it for use elsewhere.



For more information about SAQL, see the Wave Analytics SAQL Reference.

### **Expert Editor Mode (JSON Editor)**

Edit the JSON of a lens or dashboard and immediately apply your changes in the explorer. To access Expert Editor Mode, open the lens or dashboard you want to edit, and press CTRL+E for PCs or CMD+E for Macs.

```
| Total Control Contro
```

The **Reload JSON** button loads the code of the currently running lens or dashboard. This button is available whenever the JSON in the editor doesn't match the running JSON. The **Switch to Runtime** button brings you back to the explorer and shows you how edits to the JSON appear in the lens or dashboard. This button overwrites the JSON of the running lens or dashboard with the JSON in the editor. However, the edits are not saved until you explicitly save the lens or dashboard.



Note: Expert Editor Mode replaces the tool at

https://your\_Salesforce\_instance/insights/web/lens.apexp. For lenses and dashboards opened, created, or saved in the Spring '16 release, use the JSON editor instead of the lens.apexp page. A lens or dashboard from a previous release can be edited in either place, but after saving in the Spring '16 release, it no longer appears on the lens.apexp page.

For more information about JSON, see the Wave Analytics Dashboard JSON Guide.

### Create Lenses in the Flex Dashboard Designer with the SAQL Editor and Drag-and-Drop Chart Setup (Beta)

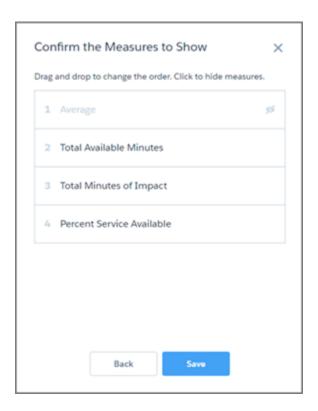
The flex dashboard designer includes new paths for adding lenses to your dashboard. Now you can convert the calculated columns of Compare Tables into visualizations, or customize your queries in the SAQL editor. Both approaches provide an easy way to set up your charts by specifying which measures to show and in what order.



Note: The flex dashboard designer's query-to-lens builder is Beta for Spring'16.

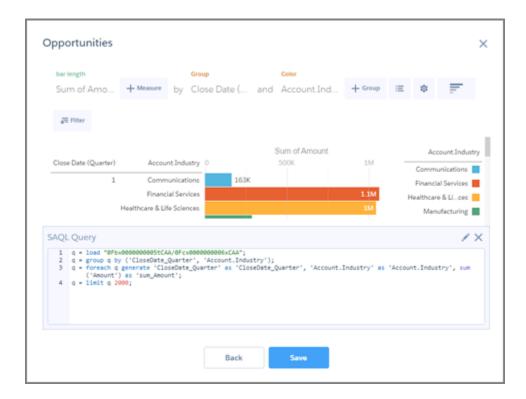
Start by clicking the Show Lenses icon and the **Create New Lens** button. Select a dataset, and then explore and create visualizations.

To use formula fields, select the Compare Table from the charts gallery and create calculated columns. When you save, you're prompted to confirm or change how you'd like the columns with measures to appear in the visualization.

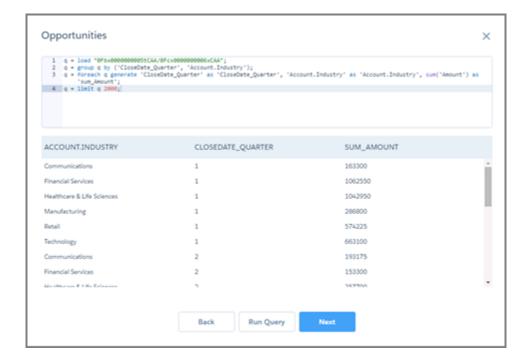


To refine your query, use the SAQL editor. In the flex dashboard designer, the SAQL viewer has an Edit icon.





The SAQL editor provides contextually smart auto-completion suggestions. When you make changes in the SAQL editor, the **Next** button is disabled until you select **Run Query** and the editor verifies that the query is valid.

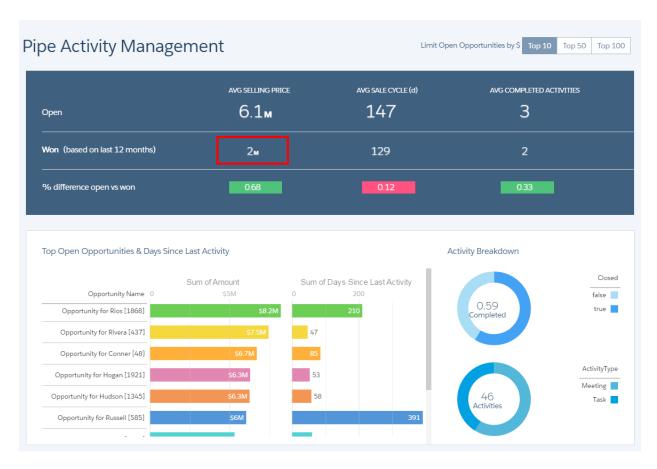


**Next** takes you to the drag-and-drop dialog box to confirm or change how you'd like the groups and measures to appear in the visualization. From there, **Save** adds the lens to the designer's available lenses.

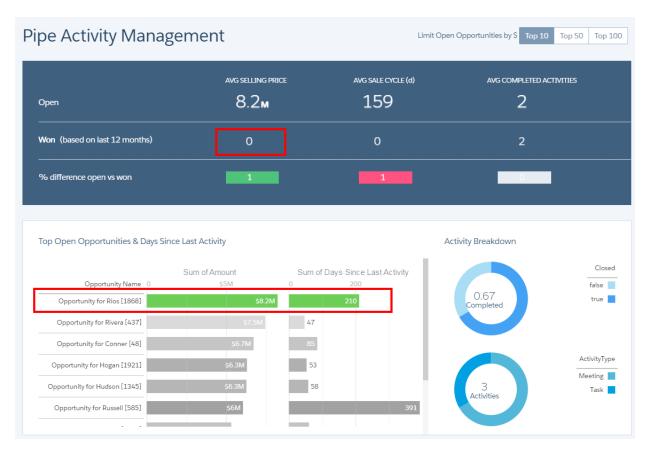
### Make Your Dashboards More Interactive with Auto-Faceted SAQL Query Lenses

You can now enable filters from compact-form query lenses and Scope widgets to be automatically applied to SAQL query lenses. For example, if you select a product in a widget in a dashboard, that product filter can also be applied to a widget built on a SAQL query lens.

The highlighted value in the following dashboard shows the average selling price for won opportunities in the last 12 months. The value comes from a number widget that is based on a SAQL query lens.



When you select the Opportunity for Rios opportunity (as shown in the following dashboard), notice how the value of the number widget changes from 2 million to 0. This occurs because auto-faceting is enabled on the underlying SAQL query lens.



To enable auto-faceting, modify the SAQL query step in the dashboard JSON. To apply filters from compact-form query lenses to the SAQL query lens, set autoFilter and isFacet to true. To apply filters from Scope widgets to the SAQL query lens, set autoFilter and useGlobal to true. If autoFilter is set to false or not specified, filters from compact-form query lenses and Scope widgets are not applied to the SAQL query lens.

Here's an example of a SAQL query step to which filters from faceted lenses and Scope widgets are applied.

```
"Id 16": {
   "isFacet": true,
   "useGlobal": true,
   "isGlobal": false,
   "query": {
      "measures": [
         [
            "avq",
            "comp act"
      ],
      "pigql": "q = load \"event20\"; q = foreach q generate
as 'avg_comp_act';",
      "autoFilter": true,
      "filters": []
   "selectMode": "single",
   "type": "aggregate",
   "datasets": [
```

```
"name": "event20"

}

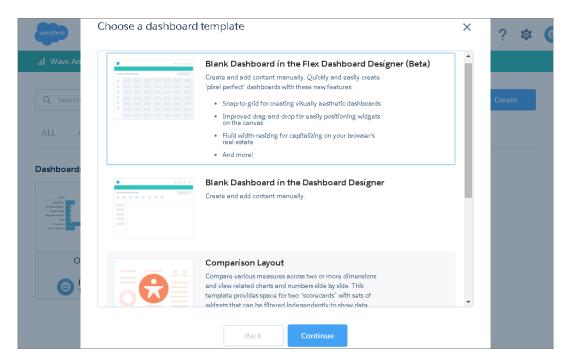
],

"visualizationParameters": {
    "visualizationType": "hbar"
}
```

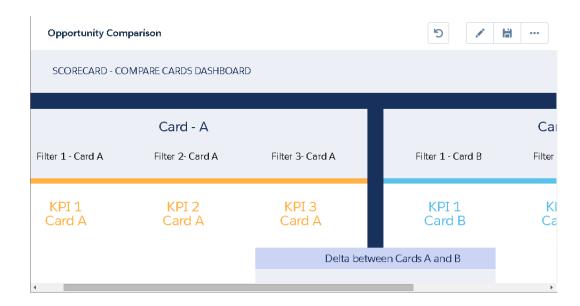
# Take Out the Guesswork When Designing a Dashboard Layout

Create more professional-looking dashboards using layout templates provided with Wave. The layouts are based on design best practices. The preconfigured layout templates let you focus more on the dashboard content and less on the layout design.

1. To create a dashboard based on a template, from the Wave home page, select Create > Dashboard.



2. Choose a layout template.



When you create a dashboard using a layout template, the dashboard opens in the original designer. You can convert it to the flex dashboard designer to take advantage of the new designer features. You can also change, remove, and add components based on your requirements.

To create your own design, skip the layout templates and start with a blank dashboard. Wave provides options to create a blank dashboard in the original or new designer.

# Quickly Get Up to Speed with Dashboard JSON Changes

Some dashboard JSON property names and values changed to make them easier to understand. When you save your dashboard, Wave updates them in the JSON for you. In addition, you can now apply new properties to widgets.

## **Changes to Property Names**

The following property names changed. When you open the dashboard, Wave updates the names in the dashboard JSON for you.

Previous Property Name	New Property Name
boxwidget	box
chartType	visualizationType
chartWidget	chart
destType	destinationType
dim	dimensions
edgemarts	datasets
em	datasets
extra	visualizationParameters
globalfilterswidget	globalfilters
imgUrl	imageUrl

Previous Property Name	New Property Name
linkwidget	link
numberwidget	number
params	parameters
pos	position
textwidget	text
youtubeUrl	url
youtubewidget	url

# Changed Values in Existing Properties

The following properties have changed values. When you open the dashboard, Wave updates the values in the dashboard JSON for you.

Property	Changed Values
selectMode	<ul><li>multi_required changed to multirequired.</li><li>single_required changed to singlerequired.</li></ul>

# **New Properties**

The following properties are new.

Property	Description
autoFilter	Enables filters from compact-form query lenses and Scope widgets to be applied to the faceted SAQL query lens. To apply filters from compact-form query lenses to the SAQL query lens, set autoFilter and isFacet to true. To apply filters from Scope widgets to the SAQL query lens, set autoFilter and useGlobal to true. If autoFilter is set to false or not specified, filters from compact-form query lenses and Scope widgets are not applied to the SAQL query lens.  For more information, see Make Your Dashboards More Interactive with Auto-Faceted SAQL Query Lenses.
	roi more information, see make rour dashboards more interactive with Auto-Faceted SAQL Query Lenses.
borderRadius	The roundness of the border corners of a widget. Valid values are $0, 4, 8$ , and $16$ . The higher the value, the more round the corner. The default is $0$ (not rounded).
borderWidth	The thickness of the border for a widget. Valid values are 1, 2, 4, and 8. The higher the value, the thicker the border. The default is 2.
computeTotal	Indicates whether to include the total measure column (true) or not (false) in the stacked waterfall or waterfall chart widget. The default is true.

#### **Property Description**

containedWidgets An array of all widgets inside the container widget. The following example shows two widgets (meafilter 1 and chart 1) included in the container widget (container 1).

```
"container 1": {
   "type": "container",
    "position":{
            "x": 0,
            "y": 0
   },
    "parameters":{
        "containedWidgets": [
            "meafilter 1",
            "chart_1"
        ]
   }
```

dualAxis

Indicates whether to include an axis for each of the two measures (true) or not (false) in a combo chart widget. The default is true.

gridLayouts

Sets the placement, size, background color, and border details of a widget in the flex dashboard designer

The following dashboard JSON snippet shows a gridLayouts section, including settings for the meafilter\_1 widget. The top left corner of the widget is at row 1, column 2. The widget spans three rows and four columns, has a border with width 2 around all edges, and has border and background colors.

```
"gridLayouts": [
   {
        "name": "desktop",
        "selectors": [],
        "version": 1,
        "widgetStyle": {},
        "pages": [
                "widgets": [
                         "name": "meafilter 1",
                        "row": 1,
                         "column": 2,
                        "rowspan": 3,
                         "colspan": 4,
                         "widgetStyle":
                             {
                                 "borderColor": "#44A2F5",
                                 "borderEdges": ["all"],
                                 "borderWidth": 2,
                                 "backgroundColor": "#E2DCF2"
                    }
                ]
            }
```

Property	Description	
	1 } ]	
	Here's a description of each attribute in the gridLayouts section.	
	<b>name</b> Internal name of the widget. This name is used to reference the widget in the dashboard JSON.	
	row  The row number where the widget starts. Column and row specify the top left corner of the widget.	
	<b>column</b> The column number where the widget starts. Column and row specify the top left corner of the widget.	
	rowspan  The number of rows that a widget spans—the height of the widget. If the dashboard doesn't have enough rows, rows are added.	
	<b>colspan</b> The number of columns that a widget spans—the width of the widget. If the dashboard doesn't have enough columns, columns are added.	
	widgetStyle Specifies the border type, border color, and background color.	
	<b>borderColor</b> Color of the widget's border. The default is #FFFFFF. If a border isn't specified, the widget has no border.	
	<b>borderEdges</b> Specifies which edges of the widget have a border. Valid values are left, right, top, bottom, and all.	
	<b>borderWidth</b> Width of the widget's border. Valid values are 1, 2, 4, and 8. Default is 2.	
	backgroundColor  Background color of the widget.	
	For more information about the new flex dashboard designer, see Quickly Build Responsive Grid-Based Dashboards with Flex Dashboard Designer (Beta).	
negativeColor	The color of the measure columns in a waterfall chart widget that have decreased in value.	
numberColor	The font color of a number widget in the flex dashboard designer only.	
numberSize	The font size of a number widget in the flex dashboard designer only. The default is 26.	
positiveColor	The color of the measure columns in a waterfall chart that have increased in value or remained the same in the chart.	
showValues	Indicates whether to display the totals for each measure column (true) in a stacked waterfall or waterfall chart widget or not (false). The default is true.	
startColor	The color of the first measure column in a waterfall chart.	

Property	Description
stretchImage	Indicates whether an image's width and height are set to the same values of a container widget's width and height ( $true$ ) or not ( $false$ ). The default is $false$ .
titleColor	The font color of the title in a number widget in the flex dashboard designer only.
titleSize	The font size of the title in a number widget in the flex dashboard designer only. The default is 26.
totalColor	The color of the total measure column in a waterfall chart widget.

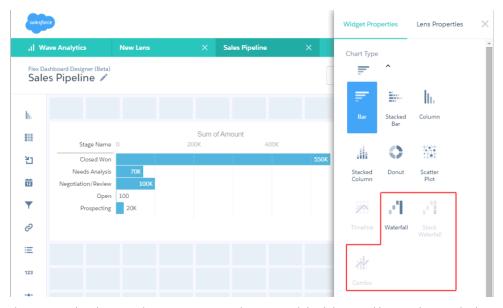
For changes to the dashboard JSON layouts section, see Experience Wave Mobile with the Latest iOS Features.

## Expand Your Visualization Capabilities with New Chart Types

Three new chart types give you more choice and control when you create Wave visualizations to help you answer questions about your business.

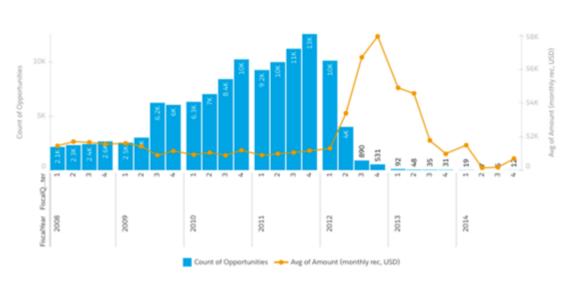
Three new chart types are now available through the Wave Analytics chart picker:

- Combo
- Waterfall
- Stacked Waterfall



The new combo chart type lets you create visualizations with both lines and bars to show multiple metrics. Use combo charts to show two sets of numbers at the same time, such as total sales and profit, revenue and profit margin, net and gross margins, and rainfall totals and temperature.

## Combo Chart



The recently added waterfall and stacked waterfall charts, which you could previously create only by editing the JSON file for a dashboard, are now available through the Wave UI. You use these types of charts—also known as "flying bricks" or "Mario" charts—to show the cumulative effect of sequentially introduced positive or negative values.



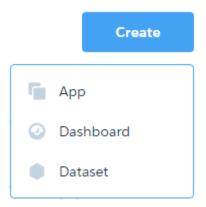
## Stacked Waterfall Chart



# Additional Interface Changes to Improve the Wave Experience

New graphical elements, revised icons, keyboard shortcuts, and more.

On the Wave home page, the **Create** button now gives you the option to create a dashboard.



On the explorer page, the history icons have moved to the right. Use the new scissors icon to clip to designer.



Hover over icons and buttons to see tooltips with keyboard shortcuts in parentheses. Issue the basic commands from your keyboard.

Keyboard Shortcut	Description
S	Save
С	Share
D	Delete
L	Clip to designer
N	Clone in new tab
R	Reset
E	Preview
CRTL+E (Windows); CMD+E (Mac)	Open JSON editor

And while your page is loading, notice the cool spinner!



## Extend the Power of Wave with Communities and New Actions

Bring Wave Analytics together with the rest of your Salesforce experience by sharing your visualizations through Communities—now generally available—and accessing additional Salesforce actions from custom menus in Wave lenses and dashboards.

#### IN THIS SECTION:

#### Securely Share Wave Analytics with Community Partners and Customers (Generally Available)

Wave Analytics for Communities is now generally available. Increase productivity and spark data-driven conversations with embedded and personalized dashboards for community members. With Wave Analytics for Communities, your partner and customer users can view and explore Wave dashboards embedded in Visualforce pages in your community. This feature is available in Salesforce Classic only.

#### Custom Action Menus Broaden Support for Standard Salesforce Actions

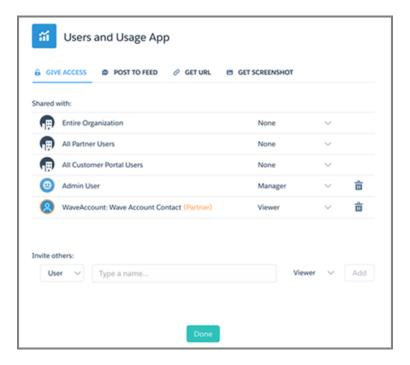
Custom action menus in Wave lenses and dashboards now give you greater access than ever to Salesforce collaboration features with Chatter actions and actions on custom objects and sObjects. This feature is available in Salesforce Classic only.

## Securely Share Wave Analytics with Community Partners and Customers (Generally Available)

Wave Analytics for Communities is now generally available. Increase productivity and spark data-driven conversations with embedded and personalized dashboards for community members. With Wave Analytics for Communities, your partner and customer users can view and explore Wave dashboards embedded in Visualforce pages in your community. This feature is available in Salesforce Classic only.

In the Wave Analytics Settings for your org, select Enable Wave Analytics for Communities. Your partner and customer users can view embedded Wave dashboards if they have the Analytics Cloud - Wave Community Users permission set license and a permission set that includes the "View Wave Analytics on Communities Pages" permission.

Access to a dashboard is given by sharing its app.



In the Share dialog, community partners and customers are highlighted in orange to distinguish them as external users. They are given Viewer access only. From their community, they can drill in and explore the dashboard, while all other areas of Wave remain inaccessible.



**Note**: Only users with a Customer Community Plus or Partner Community license can use this feature. This feature is supported in communities but not in portals.

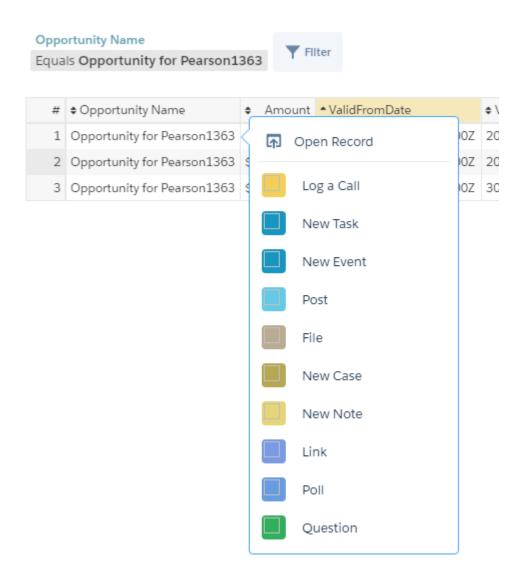
For more information about building Communities, see *Getting Started With Communities*. For more information about embedding Wave Analytics, see the wave: dashboard component in the *Visualforce Developer Guide Standard Component Reference*.

## Custom Action Menus Broaden Support for Standard Salesforce Actions

Custom action menus in Wave lenses and dashboards now give you greater access than ever to Salesforce collaboration features with Chatter actions and actions on custom objects and sObjects. This feature is available in Salesforce Classic only.

We've added new capabilities to custom action menus, which let users take advantage of Salesforce actions directly from Wave lenses and dashboards. In addition to previously supported actions—create, Log a Call, Visualforce Pages, and update—you can now use action menus to access Chatter actions:

- Post
- File
- Thanks
- Link
- Poll
- Ouestion



We've also added support for custom objects and all sObjects in action menus, which previously supported only Account, Cases, Lead, and Opportunity objects. The menus do not yet support actions on the Contacts, User, and User Profile objects; we expect to add support for additional objects in future releases.

# Experience Wave Mobile with the Latest iOS Features

Version 2.1 includes the triple-group stacked bar chart, waterfall chart, and support for Spotlight and 3D Touch.

## **Download Wave Analytics for iOS**

For the latest enhancements, download Wave Analytics from the App Store. Wave Analytics is available for Apple iPhone 4 and later models running iOS 8 and later.

## **USER PERMISSIONS**

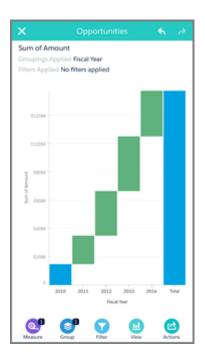
To log in to Salesforce from Wave Analytics:

"Use Wave Analytics"

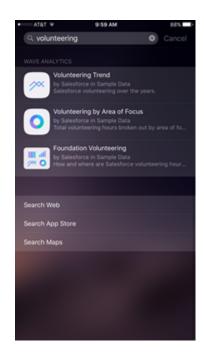


## New in Wave Analytics for iOS

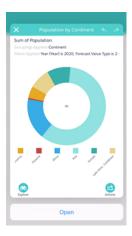
• Sales Wave users can view and present waterfall charts from any iOS device.



• Search across all your Wave orgs using iOS Spotlight. Security control is available at the org and device levels. To prevent Wave Analytics from appearing in Spotlight search results, add the SPOTLIGHT\_SEARCH attribute key in the Connected App and enter "false" for the attribute value. Or you can disable Spotlight Search for your device on the Wave Settings screen.



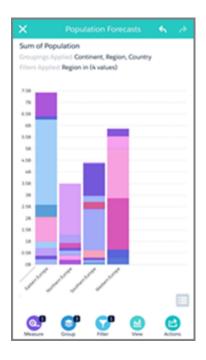
• Preview dashboards and lenses with Peek and Pop on the iPhone 6s and 6s Plus.



• Open shortcuts from the iOS Home screen via 3D Touch. On iPhone 6s and 6s Plus, press the Wave Analytics icon to search or go directly to one of the three most recently used Wave assets.



• Present three groups in stacked bar charts.



#### **Changes to Layouts JSON for Dashboards on Mobile Devices**

The layouts JSON, available for formatting dashboards for mobile devices, is changing with this release. For any existing dashboard with a layouts section, the JSON will be updated automatically with the new syntax when you open the dashboard in the Spring '15 Release.

For creating new layouts sections, use the syntax in this example. Note that layouts, pages, and rows are now arrays, and multiple pages are now expressed using a rows array for each page. In addition, the device layout options now include default.

```
"layouts": [
  {
    "device": "default",
    "pages": [
      {
        "rows": [
          "buttongroup 2 | row:{height=300}",
          "chart 1"
        ]
      },
        "rows": [
          "dimfilter_1 | dimfilter_3",
          "chart 1 {colspan=2}"
        ]
    ],
    "version": 1
  },
    "device": "ipad",
    "orientation": "landscape",
    "pages": [
```

```
{
    "rows": [
        "dimfilter_1 | dimfilter_3 | buttongroup_2",
        "chart_1 {colspan=3}"
        ]
    }
    ,
    "version": 1
}
```

For additional changes to dashboard JSON, see Quickly Get Up to Speed with Dashboard JSON Changes.

# Develop with the Wave REST API

The Wave REST API has expanded with new endpoints to give you access to dashboards, new representations for Extended Metadata, and more.

IN THIS SECTION:

Wave REST API Moves into the Limelight

The Wave REST API moves from Pilot to Generally Available. All endpoints and representations are now version 36.

Enhance Your Wave Application with New API Endpoints

New APIs enable developers to create and manipulate dashboards, see who can access features, and view Lens File properties.

## Wave REST API Moves into the Limelight

The Wave REST API moves from Pilot to Generally Available. All endpoints and representations are now version 36.

(1) Important: The internal API, that was previously used in the Wave UI, also labeled as private and for Salesforce only, is not supported. This internal API will remain operational for the next 12 months. However, clients using this internal private API will not have access to any newly created or updated dashboard assets created using tools in the Spring '16 release — for example, the Dashboard Designer, or the new flex dashboard designer. We encourage developers of such clients to port them to the Wave API GA.

Refer to the Wave REST API Developer Guide.

To set up access to the API, select Enable the Wave API for all Wave users on the Wave Analytics Settings page.

# Enhance Your Wave Application with New API Endpoints

New APIs enable developers to create and manipulate dashboards, see who can access features, and view Lens File properties.

IN THIS SECTION:

Manipulate Wave Dashboards with a New API Resource

The Wave Analytics REST API now supports the creation of dashboards.

See Who Can Access Wave Features

Use a new API endpoint to determine what features are accessible.

Manage Lens Files with New API Endpoints

New API endpoints have been added to work with Lens File properties and metadata.

#### Enhance Dashboard Data with New Extended Metadata Representations in the REST API

Extended Metadata Dimension and Measure representations are now supported in the REST API.

## Manipulate Wave Dashboards with a New API Resource

The Wave Analytics REST API now supports the creation of dashboards.

The /wave/dashboards/\${dashboardId} endpoint now supports the DELETE and PATCH methods. A host of new representations allows the manipulation of widgets and layouts in creating dashboards.

#### See Who Can Access Wave Features

Use a new API endpoint to determine what features are accessible.

The /wave/config/features endpoint returns properties indicating what Wave features are available for use.

## Manage Lens Files with New API Endpoints

New API endpoints have been added to work with Lens File properties and metadata.

Use /wave/lenses/\${lensId}/files/\${fileId} to access information about a file which is part of a lens.

Use /wave/lenses/\${lensId}/files to manage Wave lens file metadata.

## Enhance Dashboard Data with New Extended Metadata Representations in the REST API

Extended Metadata Dimension and Measure representations are now supported in the REST API.

The new extended metadata representations for dimensions and measures in the Wave REST API give developers greater access to and control over Wave Datasets and the dashboard user interface. Derived measures and derived dimensions can be defined with all the properties of their non-derived cousins. Format, labels, and visibility of certain fields can be controlled, and fields can be linked back to Salesforce records.

# **Build Powerful Queries Using SAQL**

Use the new functions in the Salesforce Analytics Query Language (SAQL) to perform windowing functions on your data, and more.

#### IN THIS SECTION:

#### Drill Down into Your Data with New Windowing Functions

SAQL aggregate functions now support windowing functionality. Using a syntax inspired by SQL, windowing enables easy calculation of common business cases, such as percent of grand total, moving average, year and quarter growth, and ranking.

#### Aggregate Better Than Average

The Median function, for finding the middle value in a group of sorted values, joins the list of supported aggregate functions.

#### **Exponentially Better Math Functions**

There are four additions to the list of supported math functions.

## Drill Down into Your Data with New Windowing Functions

SAQL aggregate functions now support windowing functionality. Using a syntax inspired by SQL, windowing enables easy calculation of common business cases, such as percent of grand total, moving average, year and quarter growth, and ranking.

Windowing functions allow you to calculate data for a single group using aggregated data from adjacent groups. Windowing does not change the number of rows returned by the query. Windowing aggregates across groups rather than within groups and accepts any valid numerical projection on which to aggregate.

Refer to the Wave Analytics SAQL Reference.

## Aggregate Better Than Average

The Median function, for finding the middle value in a group of sorted values, joins the list of supported aggregate functions.

## **Exponentially Better Math Functions**

There are four additions to the list of supported math functions.

Function	Operation
Exponential (exp)	Euler's number e raised to the power of x
Logarithm (log)	Returns the natural logarithm (base E) of a number
Power (power)	Raise x to the power of y
Square Root (sqrt)	Returns the square root of a number

# Service: Hello Field Service for Agents, Goodbye Routine Setup Tasks for Admins

Extend your support team's service out into the field with work orders. Set up knowledge faster with an automatically created article type and standard page layouts, and set up social service without contacting Salesforce or searching for settings.

#### IN THIS SECTION:

## Customer Service Tools in Lightning Experience

Support your customers even faster with more enhancements in Lightning Experience.

#### Field Service

Field service is a key ingredient of stellar customer support. Work orders make it possible to efficiently track repairs, standard maintenance, and other types of service, while Field Service Lightning provides a seamless, mobile-friendly user interface where you can manage all of your field service needs.

#### Assets

Assets help you keep track of products that customers purchase from you. They make it easy for support agents to check the serial number, version, and other relevant details so you can provide better service. This feature is available in both Lightning Experience and Salesforce Classic.

#### Knowledge

Salesforce Knowledge is a Knowledge Centered Support (KCS) certified knowledge base available in your organization. This feature is available in Salesforce Classic only.

## Console for Service

The Salesforce Console for Service gives support agents quick access to customer data to deliver superior service with fewer clicks. This feature is available in Salesforce Classic only.

#### Case Feed

Case Feed gives support agents a streamlined and intuitive way to update and view case information in context. It promotes collaboration and makes it easier to see the interaction between agents and customers. This feature is available in both Lightning Experience and Salesforce Classic.

#### Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. This feature is available in Salesforce Classic only.

#### Omni-Channel

Omni-Channel is the Service Cloud's comprehensive customer service solution that pushes work to qualified agents in real time, right from the Salesforce console. This feature is available in Salesforce Classic only.

#### SOS

SOS is an SDK that lets you add real-time embedded support to any native iOS or Android app and connect back instantly with agents in the Service Cloud Console.

#### Social Customer Service

Social Customer Service integrates Social Studio and the Salesforce Service Cloud. Service agents can engage with customers through Twitter and Facebook. This feature is available in Salesforce Classic only.

#### Web-to-Case

Easily change support requests from your company's website into cases in Salesforce. This feature is available in Salesforce Classic only.

#### Macros

Support agents who use Case Feed can use macros to complete repetitive tasks—such as selecting an email template, sending an email to a customer, and updating the case status—all in a single click. This feature is available in Salesforce Classic only.

#### Organization Sync

Looking for a way to give your users access to Salesforce during maintenance and planned upgrades? Organization Sync lets you set up a secondary, synced Salesforce org where users can work when your primary org is unavailable. This feature is available in Salesforce Classic only.

# **Customer Service Tools in Lightning Experience**

Support your customers even faster with more enhancements in Lightning Experience.

#### Assets

With assets now available in Lightning Experience, your sales and support processes just got easier. This feature is available in both Lightning Experience and Salesforce Classic.

#### Case Feed

Emails in case feed are now easier to use and support agents can insert predefined email templates or create their own. This feature is available in Lightning Experience only.

# EDITIONS

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

#### **Work Orders**

Work orders make it possible to track work to be performed on your customers' products, making life easier for support agents and field technicians. This feature is available in both Lightning Experience and Salesforce Classic.

#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience Added Features Improve Viewing Emails in Lightning Experience

# Field Service

Field service is a key ingredient of stellar customer support. Work orders make it possible to efficiently track repairs, standard maintenance, and other types of service, while Field Service Lightning provides a seamless, mobile-friendly user interface where you can manage all of your field service needs.

#### IN THIS SECTION:

#### Go Forth, Field Technicians: Introducing Work Orders (Generally Available)

Do you need to track work performed for your customers? *Work orders* represent tasks to be performed on a customer's product, typically in field service. Use work orders to efficiently track repairs, standard maintenance, and other types of service. This feature is available in both Lightning Experience and Salesforce Classic.

#### Achieve Greatness in the Field with Field Service Lightning (Generally Available)

Meet Field Service Lightning, your new field service hub in Salesforce. Schedule appointments, dispatch technicians based on skill level and location, and resolve customer issues in one seamless, mobile-friendly user interface. This feature is available in Salesforce Classic and the Salesforce1 mobile app.

# Go Forth, Field Technicians: Introducing Work Orders (Generally Available)

Do you need to track work performed for your customers? *Work orders* represent tasks to be performed on a customer's product, typically in field service. Use work orders to efficiently track repairs, standard maintenance, and other types of service. This feature is available in both Lightning Experience and Salesforce Classic.

Work orders can be associated with accounts, assets, cases, contacts, entitlements, service contracts, and other work orders. You can also create custom relationships between work orders and other standard or custom objects.

You can view work orders on the Work Orders tab or the Work Orders related list on supported objects. You can also add work orders as a navigation tab item in the service console.

Performance, Unlimited, and Developer Editions with the Service Cloud

Available in: Enterprise,

**EDITIONS** 

We recommend adding work order line items to work orders to add details about the task to be performed. Work order line items represent specific tasks that a technician must perform to complete the work order. They can mark line items as completed one by one, which makes it easier to track and improve field service processes. You can also link a line item to a specific asset, which is helpful if you need to track the repair or replacement of a particular part.

#### For example:

- If a customer purchases an asset from you and experiences a problem with it, you can create a work order to repair the asset.
- If a customer purchases an asset from you and covers it with a preventive service contract, you can create a work order that represents a periodic maintenance checkup.

#### SEE ALSO:

Model Complex Products with Hierarchical Assets Customer Service Tools in Lightning Experience

**EDITIONS** 

Available for additional purchase in: **Enterprise**, **Performance**, **Unlimited**,

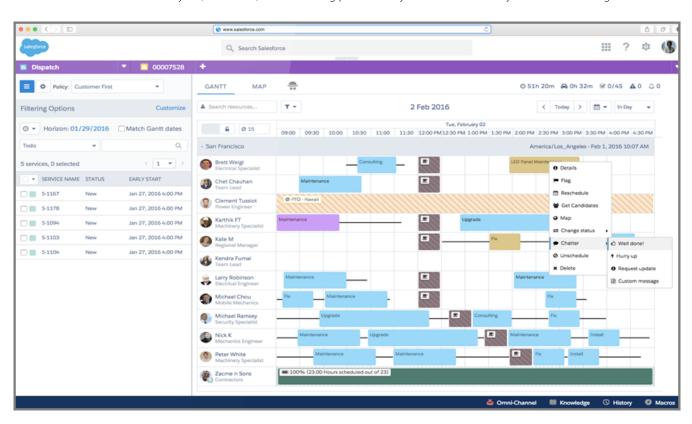
and **Developer** Editions

# Achieve Greatness in the Field with Field Service Lightning (Generally Available)

Meet Field Service Lightning, your new field service hub in Salesforce. Schedule appointments, dispatch technicians based on skill level and location, and resolve customer issues in one seamless, mobile-friendly user interface. *This feature is available in Salesforce Classic and the Salesforce 1 mobile ann.* 

Field Service Lightning includes a bevy of features that serve field service dispatchers, admins, and technicians on the go:

- A dynamic scheduling board that gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
- Smart scheduling capabilities that account for technician skill level, travel time, location, and other service factors
- A selection of out-of-the-box triggers that allow for easy customization of your scheduling and display preferences
- A robust toolbox of custom objects, work rules, and scheduling policies that you can use to define your ideal scheduling model



- Note: Users accessing Field Service Lightning via Salesforce1 will see the following differences from the desktop interface:
  - When viewing a service record in Salesforce1, you can display the service address on the map by clicking the **Related** tab on the service record, then clicking the address below the tabs to navigate to the map.
  - The dispatcher console, which includes the service list, scheduling policy picker, Gantt view, and map, is not available in Salesforce1.

To learn more about Field Service Lightning features and pricing, get in touch with your Salesforce representative.

## **Assets**

Assets help you keep track of products that customers purchase from you. They make it easy for support agents to check the serial number, version, and other relevant details so you can provide better service. This feature is available in both Lightning Experience and Salesforce Classic.

# EDITIONS

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

#### IN THIS SECTION:

#### Model Complex Products with Hierarchical Assets

Introduce hierarchy to assets in your org to represent more complex products and track the age and status of asset components. An asset can have up to 2,000 child assets, and a hierarchy of assets can have up to 50 levels. This feature is available in both Lightning Experience and Salesforce Classic.

#### Other Changes in Assets

This release includes several enhancements to assets in Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

# Model Complex Products with Hierarchical Assets

Introduce hierarchy to assets in your org to represent more complex products and track the age and status of asset components. An asset can have up to 2,000 child assets, and a hierarchy of assets can have up to 50 levels. This feature is available in both Lightning Experience and Salesforce Classic.

To give your users the option to make one asset the parent of another, add the following elements to your asset page layouts:

- Parent Asset field: Lets users select a parent asset.
- Root Asset field: Lists the top-level asset in an asset hierarchy (read only). Add this field to give users a wider view of asset hierarchies. Depending on where an asset lies in the hierarchy, its root might be the same as its parent. If an asset is at the top of a hierarchy, it is its own root asset, and the Parent Asset field is blank.

Defining parent-child relationships between assets is useful if you need to represent products that are composed of multiple smaller parts. For example, if a large machine and its components are all represented as assets in your org, you can use a parent-child structure to show which assets are components of other assets. If your org uses a custom solution to represent asset hierarchies, we recommend adopting the new built-in asset hierarchy tools.

Here are some ways to use hierarchical assets to improve your support process.

- When creating a work order to repair a broken asset, create line items on the work order that correspond to specific child assets.
- For situations where a work order is created from an asset, set up a workflow rule or process that creates a work order line item for each child asset.
- Set up a trigger that notifies the owner of an asset by email when the install date for one of the asset's child assets was more than five years before the current date.
- Create a Visualforce page that gives users a bird's-eye view of an asset hierarchy.
- Note: The Parent Asset and Root Asset fields aren't available in standard reports that include assets. However, you can reference them in custom reports.

#### SEE ALSO:

Other Changes in Assets
Customer Service Tools in Lightning Experience

# Other Changes in Assets

This release includes several enhancements to assets in Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

- The Assets tab is now default ON for all profiles in orgs created in Spring '16 or later.
- Assets are now available to users with the External Identity and Customer Community user licenses. By default, both licenses come
  with "Read," "Create," and "Edit" permissions on assets.

#### SEE ALSO:

Model Complex Products with Hierarchical Assets Customer Service Tools in Lightning Experience Salesforce1: Track Purchased Products with Assets

# Knowledge

Salesforce Knowledge is a Knowledge Centered Support (KCS) certified knowledge base available in your organization. This feature is available in Salesforce Classic only.

#### IN THIS SECTION:

## Control Your Data Integrity with Validation Rules on Article Types (Generally Available)

Ensure that your article content is compliant with your company standards. You can now create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

#### Article Type Page Layouts Function More Like Standard Page Layouts (Generally Available)

Instead of just one layout per article type, you can apply a layout per profile per article type. Now you can display more sensitive fields of the same article to only those with the correct profile.

#### Other Changes in Knowledge

Spring '16 Knowledge brings improved setup functionality and expanded license access.

# **EDITIONS**

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Enterprise** and **Unlimited** Editions

# Control Your Data Integrity with Validation Rules on Article Types (Generally Available)

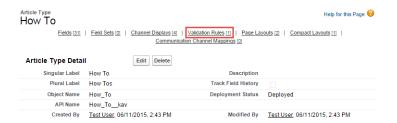
Ensure that your article content is compliant with your company standards. You can now create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

- 1. From Setup, type **Article Types** in the quick find box at the top of the Setup sidebar menu.
- 2. Select Customize > Knowledge > Knowledge Article Types.
- 3. Click the article type.
- **4.** Scroll down to the Validation Rules related list or click the **Validation Rules** link at the top of the page.

## **USER PERMISSIONS**

To create or edit validation rules for article types:

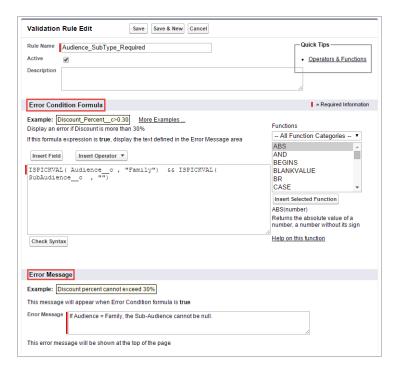
- "Customize Application"
   AND
  - "Manage Salesforce Knowledge"



5. To create a validation rule, click **New**. To edit an existing rule, click **Edit**.



- **6.** Name the rule.
- **7.** Make the rule active.
- 8. Optionally, describe what you want to control on articles of this type.



**9.** Specify an error condition formula and a corresponding error message.

The error condition is written as a Boolean formula expression that returns true or false. When true, the article is not saved, and an error message displays. The author can correct the error and try again. For information on validation rules, see Define Validation Rules in the online help.

Note: Knowledge article errors always display at the top of the page, not next to the field. Write your errors descriptively so that authors know how to satisfy the validation rule. For example, identify which field is causing the error.

#### 10. Click Save.

When creating validation rules on article types, consider the following limitations and functionality changes.

- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.
- The Article Currency field and the VLOOKUP function don't support validation rules.
- When importing articles, if the import data file has a valid article with an invalid translation, the translation is created, but its translated content isn't imported.
- Only the first validation rule error displays at the top of the page and in the import article log. If multiple errors exist but are not fixed, they are displayed on subsequent saves or imports.
- In the API, KA fields, such as Case Association Count and Archived Date, don't support validation rules. Only KAV (article version) fields are supported in validation rules.

# Article Type Page Layouts Function More Like Standard Page Layouts (Generally Available)

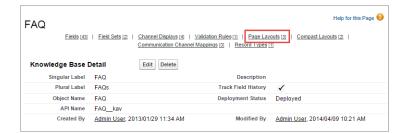
Instead of just one layout per article type, you can apply a layout per profile per article type. Now you can display more sensitive fields of the same article to only those with the correct profile.

- 1. From Setup, type **Article Types** in the quick find box at the top of the Setup sidebar menu.
- 2. Select Customize > Knowledge > Knowledge Article Types.
- 3. Click the article type.
- **4.** Scroll down to the Page Layouts related list or click the Page Layouts link at the top of the page.

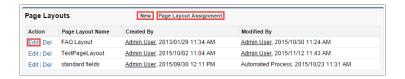
# **USER PERMISSIONS**

To customize the article-type layout:

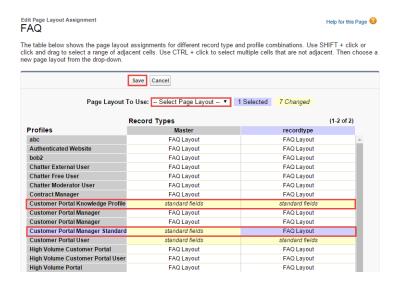
- "Customize Application" AND
  - "Manage Salesforce Knowledge"



5. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.



- **6.** To assign various layouts to the article type based on a user profile, click **Page Layout Assignments**.
- 7. Click Edit Assignment.



8. Select the profile, or profiles (using SHIFT), you want to change and select the layout from the **Page Layout To Use** drop-down.

When creating page layouts, some fields are hidden based on the user's license. Out of Date, Translation Completed Date, and Translation Exported Date are hidden from users who do not have a Knowledge User license or who are customer portal or partner portal users. In addition, Archived By and Is Latest Version are hidden from customer portal and partner portal users.

When creating multiple article type page layouts, consider the following limitations and functionality changes.

- Previously, preview pages showed the Summary field in the API that contained text values, even if they were not in the page layout. To continue displaying summary fields on preview pages, manually update your page layouts to include them.
- The article edit page only shows the standard fields (Article Number, Title, URL Name, and Summary) and all the custom fields added to the layout, including the side bar fields. Other standard fields added on the page layout are ignored because they are not editable, and the custom fields are displayed in the order specified in the page layout.
- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.
- The Communication channel layout doesn't use the page layout to determine which Article fields are inserted into a case email. The fields that are inserted include the fields selected in the Communication Channel mapping.
- You can set up a specific profile to generate a PDF file. When sending articles as PDFs, the pdf is generated based on the sender's profile. Therefore, the receiver might get fields they are not meant to see. Use the Use a profile to create customer-ready article PDFs on cases setting on the Knowledge settings page so the fields in PDFs come from the page layout assigned to the configured profile. Also, Field Level Security of both the sender profile and the configured profile are applied.

# Other Changes in Knowledge

Spring '16 Knowledge brings improved setup functionality and expanded license access.

## Default Article Type Created when Knowledge is Enabled

Now when Knowledge is first enabled, a default article type is automatically created, if the org doesn't already have one. Once you license your new org with Salesforce Knowledge, go directly to the Knowledge Settings page in Setup and enable Knowledge. You do not have to create an article type first.

#### Force.com and Chatter Plus Users Have Read Access

Administrators can grant Force.com and Chatter Plus users read access to Knowledge articles without the Knowledge User license. For new orgs, the Force.com and Chatter Plus users have read access by default. For existing orgs, enable the "Allow View Knowledge" permission by profile. The Knowledge user license is still needed to create, edit, or manage Articles.

## Console for Service

The Salesforce Console for Service gives support agents quick access to customer data to deliver superior service with fewer clicks. This feature is available in Salesforce Classic only.

#### IN THIS SECTION:

#### Improve Performance by Limiting the Number of Open Tabs

In an ideal world, agents close console tabs as soon as they resolve a case. In the real world, we're all guilty of leaving too many tabs open—and that can slow things down. Now you can limit the number of tabs that an agent can have open to ensure optimum performance of a console. This feature is available in Salesforce Classic only.

#### Preview Tab Contents with Tab Hovers

Tired of jumping from tab to tab just to get that key bit of information? With tab hovers, you can see the highlights of tab contents just by mousing over them. This feature is available in Salesforce Classic only.

# EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

### Encourage Best Practices by Preventing Agents from Closing Tabs

It's a challenge to enforce good process in a hectic service center. Now you can use an API to prevent agents from closing tabs until they've completed all required work on a case. And because it's done with the console API, you can customize it to enforce whatever business rules are critical for your organization. This feature is available in Salesforce Classic only.

#### Reminder: We Don't Support IE 8 Anymore

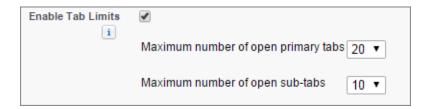
A friendly reminder: As of Summer '15, Salesforce supports only Internet Explorer® versions 9 and later. To improve agents' experience, we now hide console components (such as History) that don't perform well in unsupported browsers. So if your agents are using IE 8 or earlier, some console components won't appear. This feature is available in Salesforce Classic only.

# Improve Performance by Limiting the Number of Open Tabs

In an ideal world, agents close console tabs as soon as they resolve a case. In the real world, we're all guilty of leaving too many tabs open—and that can slow things down. Now you can limit the number of tabs that an agent can have open to ensure optimum performance of a console. This feature is available in Salesforce Classic only.

It's super easy:

- 1. In Setup, go to **Create** > **Apps**, and click the name of the console you want to modify.
- 2. Click Edit.
- 3. Check **Enable Tab Limits**, and select the number of tabs you want to allow in each session. (The subtab menu sets the maximum subtabs under each primary tab.)



#### 4. Click Save.

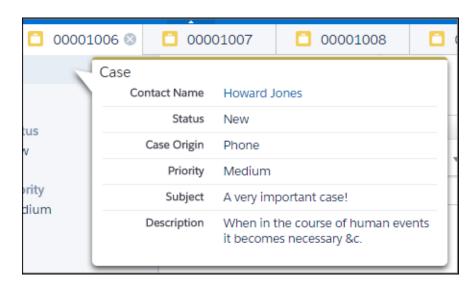
Although you can set up to 30 primary tabs and 15 subtabs, for best performance we recommend no more than 20 primary tabs and 10 subtabs.

Tab limits don't apply to agents using Live Agent or Omni-Channel.

## Preview Tab Contents with Tab Hovers

Tired of jumping from tab to tab just to get that key bit of information? With tab hovers, you can see the highlights of tab contents just by mousing over them. This feature is available in Salesforce Classic only.

Tab hovers display the most important data points on a given object, such as an account or a contact. You can customize which fields appear by editing an object's mini page layout. Here's what tab hovers look like:



Here's how to enable tab hovers:

- 1. In Setup, go to **Create** > **Apps**, and click the name of the console you want to modify.
- 2. Click Edit.
- 3. Check Enable Tab Hovers.
- 4. Click Save.

Note that tab hovers aren't supported for right-to-left languages. (Apologies to our Hebrew- and Arabic-speaking friends.) Also, tab hovers aren't available on objects without a mini page layout, including Tasks and Events, or on the following entities.

- Reports
- Dashboards
- Topics

- Tab Sets
- Email Messages
- Attachments

# **Encourage Best Practices by Preventing Agents from Closing Tabs**

It's a challenge to enforce good process in a hectic service center. Now you can use an API to prevent agents from closing tabs until they've completed all required work on a case. And because it's done with the console API, you can customize it to enforce whatever business rules are critical for your organization. This feature is available in Salesforce Classic only.

Developers familiar with the console API (the Salesforce Console Integration Toolkit) can disable a tab from closing using the disableTabClose method. The close-tab ("X") icon changes to a lock icon on hover until the business rules (such as required fields) are satisfied. Here's what the tab lock looks like:



You can prevent tabs from being closed in two ways:

- 1. Disable a primary tab. Its subtabs remain unlocked, unless disableTabClose is invoked on them individually.
- **2.** Disable a subtab. This also disables its enclosing primary tab.

#### Some caveats and considerations:

disableTabClose is fully supported when you click the close-tab icon or when invoked via API. Other ways of invoking it aren't fully supported and may not behave as you want them to.

Macros aren't fully supported. If disableTabClose is invoked via a macro, the error message might not appear, but the agent still won't be able to close the tab in most cases.

And of course, we can only lead a horse to water. An agent can still close the browser window. But hey, can't say we didn't try!

#### Tab behavior when records are deleted:

When a primary tab is disabled and its record is deleted, that whole set of tabs (primary + subtabs) automagically closes.

When a subtab is disabled and its record is deleted, the subtab remains open but refreshes as a blank tab (although any sidebar components will render).

# Reminder: We Don't Support IE 8 Anymore

A friendly reminder: As of Summer '15, Salesforce supports only Internet Explorer® versions 9 and later. To improve agents' experience, we now hide console components (such as History) that don't perform well in unsupported browsers. So if your agents are using IE 8 or earlier, some console components won't appear. This feature is available in Salesforce Classic only.

If you're in this situation, we recommend upgrading to one of the supported browsers for Salesforce Classic. (Hey, it's 2016, people.) *Good-night, sweet prince*.



# Case Feed

Case Feed gives support agents a streamlined and intuitive way to update and view case information in context. It promotes collaboration and makes it easier to see the interaction between agents and customers. This feature is available in both Lightning Experience and Salesforce Classic.

# **EDITIONS**

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

#### IN THIS SECTION:

#### Added Features Improve Viewing Emails in Lightning Experience

We've made a bunch of usability improvements to Case Feed email feed items in Lightning Experience that save screen real estate and make it easier for support agents to use their email feeds. This feature is available in Lightning Experience only.

#### Agents Can Use and Create Email Templates in Lightning Experience

Agents can now insert predefined email templates and create their own email templates in Case Feed in Lightning Experience. Templates save agents time and provide consistent responses to customer inquiries. This feature is available in Lightning Experience only.

#### Create Cases from the REST API

The REST API lets customers create cases without being authenticated to Salesforce. Use the REST API if you want to create cases from mobile applications or from your company's website without using the Web-to-Case form. This feature is available in both Lightning Experience and Salesforce Classic.

# Added Features Improve Viewing Emails in Lightning Experience

We've made a bunch of usability improvements to Case Feed email feed items in Lightning Experience that save screen real estate and make it easier for support agents to use their email feeds. This feature is available in Lightning Experience only.

#### See Who Receives an Email, at a Glance

Email recipients in the To, CC, and BCC fields are displayed on a single line, making it easier for agents to see who's part of the discussion. [1]

#### Conserve Screen Real Estate with Drop-down Headers

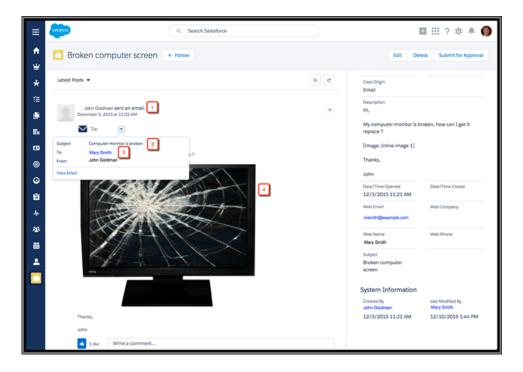
Agents get lots of information in their case feeds, and email headers can take up precious space. Agents can now view email headers (To, Cc, Bcc, From, and Subject fields) in a drop-down menu, so they can focus on the email message. To minimize clutter, the feed view doesn't show the subject line, but agents can see it when they open into the email feed item. [2]

#### View Contact and User Records with One Click

Click the name of an email recipient to see the person's contact and user information. [3]

#### **View Rich Text Formatting in Email Body**

Agents can see colors, formatting, and images in all their glory. [4]



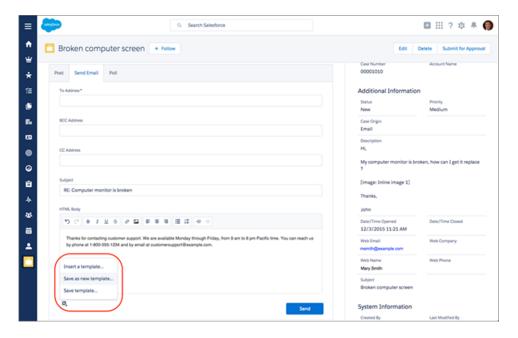
# Agents Can Use and Create Email Templates in Lightning Experience

Agents can now insert predefined email templates and create their own email templates in Case Feed in Lightning Experience. Templates save agents time and provide consistent responses to customer inquiries. This feature is available in Lightning Experience only.

Previously, email templates weren't supported in Lightning Experience. Now, agents can insert templates, create email templates from scratch, and modify a predefined template to save it as a new template.



**Note:** Templates saved in Salesforce Classic aren't available in Lightning Experience, and templates saved in Lightning Experience aren't available in Salesforce Classic. When agents first use the Send Email quick action in Lightning Experience, they won't see any email templates. Agents can create templates by entering text and clicking **Save as new template** in the email template menu. Also, agents can't save images in email templates.



The new Lightning Experience email functionality uses the Send Email quick action.

To set up emails in Case Feed in orgs created in or after Spring 16:

- 1. Enable Email-to-Case. When you enable Email-to-Case, Salesforce creates a default Send Email quick action for you.
- 2. Add the Send Email quick action to the Salesforce1 and Lightning Experience section of the case page layout.

To set up emails in Case Feed in orgs created before Spring 16 where Email-to-Case is already enabled:

- 1. Create a guick action of the type Send Email.
- 2. Add the Send Email quick action to the Salesforce1 and Lightning Experience section of the case page layout.

#### SEE ALSO:

Salesforce Help: Use Email Templates in Case Feed Salesforce Help: Create Object-Specific Quick Actions Salesforce Help: Page Layouts

## Create Cases from the REST API

The REST API lets customers create cases without being authenticated to Salesforce. Use the REST API if you want to create cases from mobile applications or from your company's website without using the Web-to-Case form. This feature is available in both Lightning Experience and Salesforce Classic.

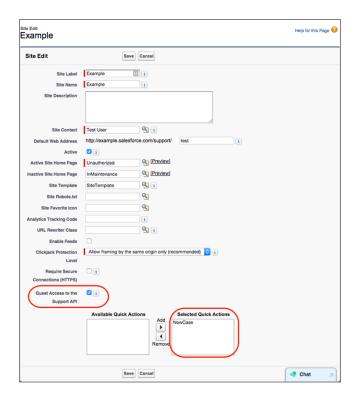
To enable this feature, contact Salesforce. After the feature is enabled, the **Enable Guest Access to the Support API** setting is visible. After you select **Enable Guest Access to the Support API**, you can use global actions to create cases. Global actions let you define which fields are exposed

# **USER PERMISSIONS**

To create and edit Force.com sites:

"Customize Application"

in the REST API and the default values that are set when the case is created. Create a global action where the Record Type is Create a Record and the Target Object is Case.



When cases are created depends on whether users are authenticated, or logged in to Salesforce.

- If users aren't authenticated, cases are placed in the Web-to-Case queue.
- If users are authenticated, cases are created in real time.
- 1. From Setup, enter "Sites" in the Quick Find box, then select Sites.
- 2. Select the Enable Guest Access to the Support API option.
- 3. Use the picklist to select the global actions that you want to use for this endpoint.
- 4. Click Save.

#### SEE ALSO:

Salesforce Help: Creating and Editing Force.com Sites

Salesforce Help: Global Actions

Salesforce Help: Create Global Quick Actions

# Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. This feature is available in Salesforce Classic only.

We've added a video to help you get Live Agent set up in the Console. Check it out over in the Videos section, and get your agents chatting!

#### IN THIS SECTION:

#### **Enhanced Chat Transfer**

Agents can transfer chats more easily than ever with Transfer to Agent, Skill, and Button. You can enable these transfer types independently, providing your agents with the appropriate transfer options to best assist their customers. Plus, they can also add messages to their transfers and conferences, so the next agent can hit the ground running. This feature is available in Salesforce Classic only.

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#### IN THIS SECTION:

#### Transfer Chats to a Chat Button or Oueue

Agents can now transfer a chat to a chat button or queue with Transfer to Button. You can enable and disable this feature in the Live Agent Configuration under Setup. This feature is available in Salesforce Classic only.

#### **Choose Transfer Options for Your Agents**

Enable transfer options separately to provide only the transfer options your agents use. This feature is available in Salesforce Classic only.

## Keep Support Agents in Sync with Chat Transfer and Conference Messages

Agents can keep their teams on the same page by including a message when they initiate a chat transfer or conference. This feature is available in Salesforce Classic only.

#### Transfer Chats to a Chat Button or Queue

Agents can now transfer a chat to a chat button or queue with Transfer to Button. You can enable and disable this feature in the Live Agent Configuration under Setup. This feature is available in Salesforce Classic only.

Transfer to Button allows agents to transfer a chat to a chat button or queue. When the transferred chat is sent to a queue, it's added into the list of incoming chats by its age, so it will appear higher than brand-new chat requests. Your customers won't get stuck waiting for another agent.



**Note**: With Transfer to Button, only agents in the designated queue who have open capacity can see and accept the chat transfer. See "Transfer Chats to an Agent, Button, or Skill" for more information.

# **EDITIONS**

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

## **Choose Transfer Options for Your Agents**

Enable transfer options separately to provide only the transfer options your agents use. This feature is available in Salesforce Classic only.

Transfer is more than just an on-or-off feature—rather than turning transfer on or off across the board, you can now enable Transfer to Agent, Transfer to Button, and Transfer to Skill separately.

For example, if your organization uses only one chat button, your agents probably don't need the option to transfer to a different button. Or, the support supervisor may prefer to let agents transfer chats to a chat button or skill group, but not directly to one another. It's up to you and your organization to decide which options best help your agents succeed.

Enable transfer options under **Setup** > **Live Agent** > **Live Agent Configurations**.

## Keep Support Agents in Sync with Chat Transfer and Conference Messages

Agents can keep their teams on the same page by including a message when they initiate a chat transfer or conference. This feature is available in Salesforce Classic only.

When chats are transferred between agents, customers shouldn't feel like they're repeating themselves. Agents can add a private message that provides some context to the chat, enabling the agent who continues the chat to solve the customer's issues without any kinks.

# **Omni-Channel**

Omni-Channel is the Service Cloud's comprehensive customer service solution that pushes work to qualified agents in real time, right from the Salesforce console. This feature is available in Salesforce Classic only.

# **EDITIONS**

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

## IN THIS SECTION:

#### Automatically Re-Route Waiting Requests with Push Time-Out

When agents aren't able to accept or reject work right away, customers can get stuck waiting

for help. We've created a time-out feature that routes an item to another agent if it isn't responded to within an established amount of time. This feature is available in Salesforce Classic only.

# Automatically Re-Route Waiting Requests with Push Time-Out

When agents aren't able to accept or reject work right away, customers can get stuck waiting for help. We've created a time-out feature that routes an item to another agent if it isn't responded to within an established amount of time. This feature is available in Salesforce Classic only.

To keep your customers from waiting, you can set a timer in your Routing Configuration for how long a request appears for an agent before the task is routed to someone else. If they respond before the time-out, the agent is back in business. If they don't respond, you can set your Presence Configuration to automatically change their status, so they don't receive any more requests while they're unavailable.

Customers get what they need faster, and agents don't have to constantly sift through their requests to make it happen. You can set Push Time-Out under **Setup > Omni-Channel > Routing Configurations**, and enable status changes under **Setup > Omni-Channel > Presence Configurations**.

## SOS

SOS is an SDK that lets you add real-time embedded support to any native iOS or Android app and connect back instantly with agents in the Service Cloud Console.

#### IN THIS SECTION:

#### Provide Better Support by Accessing Your Customer's Cameras During an SOS Session (Beta)

In the world of online customer support, sometimes you just wish the customer could show you what they're talking about. With two-way video in SOS, customers can share live video

footage with either camera while speaking with agents. In the latest revision of this SDK, we've improved the performance of two-way video.

## Improve the Customer Support Experience in Your App Using the SOS Agent Availability API

It's never fun to call customer support only to find out that no agents are available. The new agent availability API in the SOS SDK allows you to detect if there are any available agents before initiating a call. You can then use this information in your app to give your customers other options to get support.

# Provide Better Support by Accessing Your Customer's Cameras During an SOS Session (Beta)

In the world of online customer support, sometimes you just wish the customer could show you what they're talking about. With two-way video in SOS, customers can share live video footage with either camera while speaking with agents. In the latest revision of this SDK, we've improved the performance of two-way video.

This release contains a beta version of two-way video that is not yet suitable for a production environment. For more information, contact Salesforce.

The SOS SDK lets you access a customer's live camera feed during an SOS session. When a customer

presses the two-way video button, they see a full-screen camera view and the video feed from this view is sent to the SOS agent. This feature can be an amazing asset in a situation when the customer wants to show exactly what is going on.

# **EDITIONS**

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

# EDITIONS

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



If a customer's device has both a front-facing and back-facing camera, the customer can swap cameras with an icon that appears during the two-way video session. An agent can use this front-facing camera to have a more effective conversation, taking advantage of video rather than just text or audio.

SEE ALSO:

SOS Developer's Guide

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EDITIONS

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

SEE ALSO:

SOS Developer's Guide

## Social Customer Service

Social Customer Service integrates Social Studio and the Salesforce Service Cloud. Service agents can engage with customers through Twitter and Facebook. This feature is available in Salesforce Classic only.

# EDITIONS

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

#### IN THIS SECTION:

## Know which Social Studio Account You're Using without Leaving Salesforce (Generally Available)

Your Social Studio identity fields, your link between social media and Salesforce, are available on the Social Customer Service settings page. You can see both your Social Hub username and the email address associated with that username, as long as your Social Hub session is active. You no longer need to leave the settings page to figure out which account you are using. This feature is available in Salesforce Classic only.

## Moderate Social Posts Easier and Faster (Generally Available)

If you moderate which social posts are promoted to cases and which are ignored on the Social Post tab, you'll find it loads faster than ever. To make your triage process and reporting clearer, there are two new values in the Reviewed Status picklist: Needed (a review is needed) and Reviewed (the post has been reviewed and a case created). This feature is available in Salesforce Classic only.

## Other Changes in Social Customer Service (Generally Available)

With Spring '16, Social Customer Service brings self-starting setup and easier findability in for admins. This feature is available in Salesforce Classic only.

# Know which Social Studio Account You're Using without Leaving Salesforce (Generally Available)

Your Social Studio identity fields, your link between social media and Salesforce, are available on the Social Customer Service settings page. You can see both your Social Hub username and the email address associated with that username, as long as your Social Hub session is active. You no longer need to leave the settings page to figure out which account you are using. This feature is available in Salesforce Classic only.



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If you moderate which social posts are promoted to cases and which are ignored on the Social Post tab, you'll find it loads faster than ever. To make your triage process and reporting clearer, there are two new values in the Reviewed Status picklist: Needed (a review is needed) and Reviewed (the post has been reviewed and a case created). This feature is available in Salesforce Classic only.

Orgs using the default Apex class (without customizations) or orgs created in Spring '16 get these improvements automatically. To take advantage of these improvements, orgs with a custom Apex class might need to update their Apex class.

If your custom Apex is extended from the default Apex class, you get the update for the default apex functions you call. If your custom Apex isn't extended from the default Apex class (you copied the default and changed it), update your Apex class manually.

To manually update your custom Apex class, add the following code and update your moderation social post list filter.

1. After all the relationships have been set on the post, call this method directly before inserting the post.

```
private void setModeration(SocialPost post) {
    //if we don't automatically create a case, we should flag the post as requiring
moderator review.
    if(post.parentId == null)
        post.reviewedStatus = 'Needed';
}
```

In the default Apex, see lines 50 and 61—65.

**2.** Update your moderation social post list filter from:

```
Parent EQUAL TO "" AND ReviewStatus NOT EQUAL TO "ignore"

To:

Parent EQUAL TO "" AND ReviewStatus EQUAL TO "Needed"
```

To ensure that you don't lose track of the social posts already in your moderation queue, make a list view with the new filter, and switch to it when the new and old filters show the same results.

# Other Changes in Social Customer Service (Generally Available)

With Spring '16, Social Customer Service brings self-starting setup and easier findability in for admins. This feature is available in Salesforce Classic only.

## **Set Up Starter Pack Without Contacting Salesforce**

New orgs can now enable the Starter Pack, the quick start package for orgs with two or fewer social accounts, without contacting Salesforce support. Orgs created before Spring '16 can call Salesforce to request enablement. You can enable the Starter Pack on the Social Customer Service Setting page, from Setup, type **med** in the quick find box and click **Social Customer Service**.

## **New Settings Page Location**

No need to dig deep within the setup tree to find the Social Customer Service Settings page. Jump straight to the new Social Media section by typing **med** in the quick find box at the top of the Setup sidebar.

## **Easy Deep Links for Twitter Direct Message Invitations**

As of February 18, 2016, if your Twitter settings allow you to receive direct messages from anyone, you can send deep links to invite users to direct message conversations. To send a deep link direct message invitation, paste this link into your outbound message: https://twitter.com/messages/compose?recipient\_id={your Twitter account's numeric user ID}

You can find your twitter account's numeric ID on twitter.com by going to **Your Twitter User** > **Settings** > **Your Twitter Data**. Twitter handles the URLs and the rendering in their native clients.

## Web-to-Case

Easily change support requests from your company's website into cases in Salesforce. This feature is available in Salesforce Classic only.

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

#### IN THIS SECTION:

#### reCAPTCHA Lets You Validate That Cases Are Submitted by People, Not Spammers

Enable the reCAPTCHA widget in Web-to-Case to make it easy for customers to contact your company while making it difficult for spambots to waste service representatives' time. The reCAPTCHA widget requires customers to select a checkbox successfully before they can create a case. Enabling spam filtering lets customer service agents focus on actual customer cases, and not on spam cases. This feature is available in Salesforce Classic only.

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

## **Macros**

Support agents who use Case Feed can use macros to complete repetitive tasks—such as selecting an email template, sending an email to a customer, and updating the case status—all in a single click. This feature is available in Salesforce Classic only.

#### IN THIS SECTION:

## Run Macros on Any Object with a Feed-Based Layout and Increase Agent Productivity

Your support agents can save even more time and mouse clicks by using macros on standard and custom feed-based objects. Macros now are supported on all objects with feed-based page layouts. No setup is needed, other than creating the macros, of course. Previously, we supported macros only on account, contact, lead, and case objects. This feature is available in Salesforce Classic only.

### Run Macros Programmatically Using the API

We've built out the API so that developers can select and run macros using code. Developers can use the Javascript API to create custom console components that show and filter macros, increasing agent productivity. For example, create a console component to display the top 10 most frequently used macros so that agents don't have to lose time searching for them. Or, filter macros by language in a custom footer component so that agents can quickly find macros that are localized for a certain language. This feature is available in Salesforce Classic only.

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#### SEE ALSO:

Salesforce Help: Macros
Salesforce Help: Create Macros

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**Note**: Developers can use the API only to build new custom console components. The API doesn't override how the macros widget works.

## SEE ALSO:

SOAP API Developer Guide: MacroInstruction

## **EDITIONS**

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

# Organization Sync

Looking for a way to give your users access to Salesforce during maintenance and planned upgrades? Organization Sync lets you set up a secondary, synced Salesforce org where users can work when your primary org is unavailable. This feature is available in Salesforce Classic only.

# EDITIONS

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

## IN THIS SECTION:

#### Suspending a Connection Hides Published and Subscribed Objects Related Lists

When an Organization Sync connection is suspended, users can't modify the connection. To help users remember this, the Published Objects and Subscribed Objects related lists are now hidden while a connection is suspended. This feature is available in Salesforce Classic only.

## Bulk Sync a Specific Number of Entities to Save Time

Now you can minimize Organization Sync processing times by bulk sync instead of syncing all entities (objects) by date. Limiting the number of objects to include in a bulk sync gives you more control over records copied between orgs. This feature is available in Salesforce Classic only.

## New In Progress Connection Status for More Clarity

Now when you click **Subscribe/Unsubscribe** on a connection between two orgs, In Progress appears in the Connection Status of both orgs until a sync is finished. This new status adds more clarity about the sync process for admins. This feature is available in Salesforce Classic only.

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SEE ALSO:

Salesforce Help: Perform a Bulk Sync

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Now when you click **Subscribe/Unsubscribe** on a connection between two orgs, In Progress appears in the Connection Status of both orgs until a sync is finished. This new status adds more clarity about the sync process for admins. This feature is available in Salesforce Classic only.

SEE ALSO:

Salesforce Help: Managing Connections

# Mobile: Do More On the Go

Office? Who needs an office? It keeps getting easier to do what needs doing, from anywhere your sales reps and service agents find themselves. The Salesforce1 mobile app is smarter these days with the enhanced, interactive charts from Lightning Experience, plus new support for objects that keep track of products purchased from you and work orders performed for your customers. And everyone benefits from the reimagined, easy-to-use Salesforce Authenticator mobile app. Our new two-factor authentication app gives your org the strong protection it needs without requiring your users to jump through inconvenient and time-wasting hoops.

#### IN THIS SECTION:

## Salesforce 1: Boost Mobile Productivity With Enhanced Charts, Service Cloud Objects, and More

The Salesforce1 mobile app helps sales reps stay up to date on their most-important records, activities, Chatter conversations, reports, and dashboards—from wherever they are. No more heading back to the office to get answers to the toughest questions—enhanced, interactive charts put more information at the tip of your sales reps' fingers. On-the-go field and service reps can keep track of purchased products with Assets or track maintenance and repairs with Work Orders. Oh, and did we mention that Search now has spell checking, in case users make a typing error when entering a search term?

## Salesforce Authenticator Mobile App, Version 2.0, for Two-Factor Authentication

We've completely reimagined, redesigned, and rebuilt the Salesforce Authenticator mobile app. Version 2.0 is a powerful and innovative two-factor authentication app for iOS and Android mobile devices. Not only does the new version of the app provide strong protection, it's also super easy to use. Your users enjoy enhanced security and increased convenience—all in one beautiful app. Salesforce Authenticator works for Lightning Experience, Salesforce Classic, and the Salesforce mobile app.

#### SalesforceA

Manage users and view information for Salesforce organizations from your mobile device.

# Salesforce1: Boost Mobile Productivity With Enhanced Charts, Service Cloud Objects, and More

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

Mobile: Do More On the Go

#### IN THIS SECTION:

## Access the Salesforce 1 Mobile App

Your users have several options for accessing Salesforce1 on mobile devices.

#### What's New in the Salesforce1 Downloadable App for Android

The latest release of the Salesforce1 downloadable app for Android is version 9.0. It will be released to Google Play in early March 2016 and gradually rolled out to customers over a couple of weeks.

## Salesforce1 Enhancements in This Release

Our latest round of new and improved Salesforce1 features makes it easier to access Salesforce on the go.

#### Salesforce 1 Differences from the Full Salesforce Site

The Salesforce1 mobile app doesn't have all the functionality of the full Salesforce site, and also includes some features that aren't available in the full site. See if there are differences between Salesforce1 and the full site for this release's new and enhanced features.

### Salesforce1 App Development Overview

Several Force.com platform enhancements support Salesforce1 development.

# Access the Salesforce1 Mobile App

Your users have several options for accessing Salesforce1 on mobile devices.

- Install the Salesforce1 downloadable app on Apple® and Android ™ mobile devices. Users can download the app from the App Store
  or Google Play™.
- Access the Salesforce 1 mobile browser app from a supported mobile browser on Apple, Android, and Windows 8.1 devices. This option doesn't require anything to be installed.

See Requirements for the Salesforce 1 Mobile App in the Salesforce Help for more details about supported devices and browsers.

# What's New in the Salesforce1 Downloadable App for Android

The latest release of the Salesforce1 downloadable app for Android is version 9.0. It will be released to Google Play in early March 2016 and gradually rolled out to customers over a couple of weeks.

At a glance, here is what's new in Salesforce1 for Android, version 9.0.

- TLS 1.1/1.2 Support for Salesforce1 for Android
- Track Purchased Products with Assets
- Streamline Field Service with Work Orders (Generally Available)
- Access and Share External Microsoft and Google Files
- Edit Microsoft Office 365 Files
- New Color Palette for Salesforce1 for Android

Enhanced offline support, allowing mobile users to create and edit Salesforce records while working offline, is now available for Salesforce1 for Android, version 9.0 through a public pilot program. To learn about this pilot feature, including how to enable it for your org, see Create and Edit Records While Offline Using Salesforce1 for Android (Pilot).

We also recommend checking out this new topic:

How to Begin Implementing Enhanced Security for Salesforce1 for Android with MDM



**Note**: The next update of the Salesforce1 downloadable app for iOS is expected in the Summer '16 timeframe. See Update on Salesforce1 for iOS Release Plans for more information.

## Salesforce1 Enhancements in This Release

Our latest round of new and improved Salesforce1 features makes it easier to access Salesforce on the go.



Note: The new Salesforce1 downloadable app for Android, version 9.0 will be released to Google Play in early March 2016 and gradually rolled out to customers over a couple of weeks. Here's the list of enhancements in this release.

You've probably noticed that some Spring '16 features are available only in the Salesforce1 mobile browser app. Fear not—many of these enhancements will be in future updates to the Salesforce1 downloadable apps for Android and iOS.

The Salesforce1 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—determine the Salesforce data and features that are available to each Salesforce1 user.

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Device and Browser Support				
Update on Salesforce1 for iOS Release Plans		✓		
TLS 1.1/1.2 Support for Salesforce1 for Android	✓			
Navigation and Actions Enhancements				
URL Custom Buttons and Links Now Available in Salesforce1	✓	✓	✓	<b>✓</b>
Select Whether a Quick Action Creates a Feed Item On Execution	<b>~</b>		✓	<b>~</b>
	(As of v8.0)			
Create Custom Success Messages for Quick Actions	<b>✓</b> (As of v8.0)		✓	✓
Search Enhancements	· ,			
Spell Check for Search Results	✓	✓	✓	
Get More Relevant Search Results with Synonym Groups	✓	✓	✓	
Relationship and Data Management Enhancements				
Get More Account Insights (Tablets Only)	✓	✓	✓	
Team Up to Close Opportunities	~	✓	<b>✓</b>	<b>~</b>
Sales Productivity Enhancements				
New Events Prefilled with Date and Time	✓			
See Images in Notes	<b>~</b>	✓	✓	~
See Previous Versions of Notes	<b>~</b>	✓	✓	<b>✓</b>
Customer Service Tools Enhancements				
Track Purchased Products with Assets	✓		✓	<b>✓</b>
	(As of v9.0)			
Streamline Field Service with Work Orders (Generally Available)	✓		✓	<b>~</b>
	(As of v9.0)			
Reports and Dashboards Enhancements				
See Enhanced Charts (Phones Only)	✓	✓	~	<b>~</b>

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Chatter Enhancements				
More Relevant Mention Suggestions	✓	✓	<b>~</b>	
Create Broadcast Groups	✓	✓	<b>~</b>	<b>✓</b>
Send Email Notifications for Group Announcements (Beta)	<b>~</b>	✓	✓	<b>~</b>
Create and Join More Groups	<b>~</b>	✓	<b>✓</b>	<b>~</b>
Salesforce Files Enhancements				
Access and Share External Microsoft and Google Files	✓	✓	<b>✓</b>	<b>~</b>
	(As of v9.0)	(As of v7.3)		
Edit Microsoft Office 365 Files	✓	✓		<b>~</b>
	(As of v9.0)	(As of v7.3)		
Offline Enhancements				
Create and Edit Records While Offline Using Salesforce1 for Android	<b>~</b>			<b>~</b>
(Pilot)	(As of v9.0)			
Security Enhancements				
How to Begin Implementing Enhanced Security for Salesforce1 for	✓			<b>~</b>
Android with MDM	(As of v8.0)			
Other Enhancements				
New Color Palette for Salesforce1 for Android	<b>~</b>			
	(As of v9.0)			

## Salesforce1: Update on Salesforce1 for iOS Release Plans

As we announced in December 2015, the release of the Salesforce1 downloadable app for iOS, version 8.0 was delayed due to a compatibility issue with iOS 9. This issue is now resolved in iOS 9.2 and later, so we want to update you on our new Salesforce1 for iOS release plans.

The features that were originally planned for Salesforce1 for iOS, version 8.0—including enhanced MDM support and support for Salesforce Knowledge Articles—will now be available in a major app update following the Summer '16 release.



**Note:** The release schedule for the Salesforce1 downloadable app for Android is unchanged. The version 8.0 app is available now from Google Play and a new version is targeted for release shortly after the completion of the Spring '16 release.

The Salesforce1 for iOS update in Summer '16 will require iOS 9.2 or later. Salesforce1 for iOS, version 7.3.x will be the only version available to download for devices with iOS 9.1 or earlier. To ensure a smooth transition for your org, we recommend that your users keep the OS current on their devices. Users can install the latest iOS version for free—see Update the iOS software on your iPhone, iPad, and iPod

touch on the Apple Support site for help. For the full list of iOS devices that Salesforce1 supports, see Requirements for the Salesforce1 Mobile App in the Salesforce Help.

In the meantime, we'll continue addressing issues in the current Salesforce1 for iOS app. Version 7.3.4, a minor bug fix release, will be available soon.

## Salesforce1: TLS 1.1/1.2 Support for Salesforce1 for Android

Starting in 2017, Salesforce will begin disabling the TLS 1.0 encryption protocol using a phased approach. We're disabling TLS 1.0 so we can maintain the highest security standards and promote the safety of your data. As you work on upgrading to TLS 1.1 or TLS 1.2, also consider the impact this change may have on the Salesforce1 downloadable app for Android and your Android users.

After Salesforce disables TLS 1.0, any inbound connections to, or outbound connections from, Salesforce (including Salesforce1) will need to use the TLS 1.1 or TLS 1.2 encryption protocol. What does this mean for the Salesforce1 downloadable app for Android? It depends on the OS that's running on the Android device.

- Devices with Android OS 4.4 or greater don't require any action to take advantage of the higher security standards of TLS 1.1/1.2.
- Devices with Android OS 4.3 or earlier, however, don't support TLS 1.1/1.2. Salesforce1 for Android users who haven't upgraded to a later OS won't be able to perform any inbound or outbound connections after TLS 1.0 is disabled.

To ensure a smooth transition, we recommend that your Android users upgrade their devices to Android OS 4.4 or later before the phased disabling of TLS 1.0 begins.

For more information, see *Knowledge Article*: Salesforce Disabling TLS 1.0.

## Salesforce1: Spell Check for Search Results

Anyone who has used a mobile keyboard knows it's easy to make mistakes when typing. Spell check for search results is here for the assist. When users enter a search term that doesn't yield results, they see results that match a corrected spelling of the search term. For example, a user enters <code>Californis</code>, which is obviously a typo, but fortunately gets results for <code>California</code>. Spell correction works for Salesforce Knowledge articles, feeds, groups, files, and Chatter questions, and is available in English only. This feature is supported in all versions of the Salesforce1 mobile app.

For more information, see Spell Correction Expanded to More Objects.

## Salesforce1: Get More Relevant Search Results with Synonym Groups

Synonym groups have words or phrases that are treated equally in searches. A search for one term in a synonym group returns results for all terms in the group. For example, a search for *USB* returns results for all the terms in a synonym group containing *USB*, thumb drive, flash stick, and memory stick. More results with less guessing! All your synonym groups are available for Salesforce Knowledge articles, cases, feeds, files, and Chatter Questions. This feature is available in all versions of Salesforce1.

For more details, see Synonym Groups Enabled for More Objects and Maximum Limit Increased.

## Salesforce1: Get More Account Insights (Tablets Only)

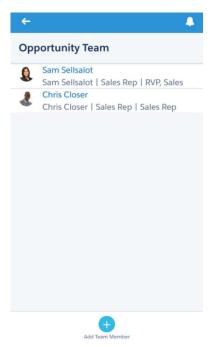
For Salesforce1 tablet users, getting the latest, most relevant news while on the go just got better. Salesforce1 now displays more than one news item in the Account Insights card. The exact number of items is determined by a device's screen size. This enhancement is available in all version of Salesforce1 when run on a tablet.

Plus, users can easily submit feedback to help us improve future news results—this option is available on phones and tablets. For more details, see Account Insights: Improve the Relevancy of News in Lightning Experience.

## Salesforce1: Team Up to Close Deals

Your sales reps can now increase and simplify a sales team's access to opportunities by putting together a winning opportunity team on the go. Opportunity team members have increased access to the opportunity and its related records. This feature is available in all versions of the Salesforce1 mobile app.

The opportunity team related list is now available on opportunities in Salesforce1 so reps can quickly see who's on the team. Tap the card to view team member details, add individual new team members, or edit existing team members.



## Salesforce1: Streamline Field Service with Work Orders (Generally Available)

Support technicians can now efficiently track repairs, standard maintenance, and other types of service while in the field. Work orders are available in the Salesforce1 downloadable app for Android, version 9.0 or later and in the Salesforce1 mobile browser app.

Users access the Work Orders home page from the Recent section of the Salesforce1 navigation menu. To locate this item, it may be necessary to expand the Recent section by tapping **More**. Work Orders is automatically included in the navigation menu as part of the Smart Search Items element. See Salesforce1 Mobile App Navigation Menu in the Salesforce Help for information about how the navigation menu is populated.

To learn more about work orders, see Go Forth, Field Technicians: Introducing Work Orders (Generally Available).

## Salesforce1: Track Purchased Products with Assets

Support technicians and sales reps can now quickly check customers' assets (purchased products) from the field. Assets are available in the Salesforce1 downloadable app for Android, version 9.0 or later and in the Salesforce1 mobile browser app.

Users access the Assets home page from the Recent section of the Salesforce1 navigation menu. To locate this item, it may be necessary to expand the Recent section by tapping **More**. Assets is automatically included in the navigation menu as part of the Smart Search Items element. See Salesforce1 Mobile App Navigation Menu in the Salesforce Help for information about how the navigation menu is populated.

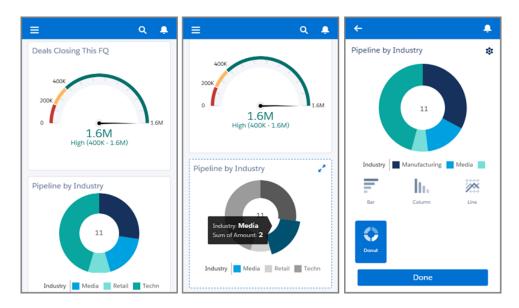
To learn more about this object, see Assets Overview in the Salesforce Help.

## Salesforce1: See Enhanced Charts (Phones Only)

The beautiful, interactive charts that you know from Lightning Experience make their Salesforce1 debut. This feature is available in all versions of Salesforce1, on phones only.

Enhanced charts in Salesforce1 are disabled by default. To enable the new chart experience, from Setup, enter Reports in the Quick Find box, then select Reports and Dashboards Settings. Select Enable Enhanced Charts in Salesforce1 to make the switch.

When enhanced charts are enabled for Salesforce1, all users get the new charts in the mobile app, regardless of the interface they use in the full site: Lightning Experience or Salesforce Classic.



#### With enhanced charts:

- Tap on a chart element to see details about it without needing to drill into the under-laying report.
- Drill into a chart's under-laying report and tap on a chart element to filter the report by the selected element.
- Change chart types and see data in a new way.

Enhanced charts don't have all the functionality that's provided with Salesforce classic charts. Before enabling enhanced charts, make sure that your mobile users will have the features they need. Check out Salesforce 1 Differences from the Full Salesforce Site.

## Salesforce1: More Relevant Mention Suggestions

Now it's quicker than ever to keep the right people informed in Chatter feeds. When a user wants to mention colleagues in a post or comment, Chatter suggests people and groups that the user interacts with most, instead of simply displaying an alphabetical list. This enhancement is especially helpful on mobile devices because it reduces scrolling to find the right selection. This feature is available in all versions of the Salesforce1 mobile app.

## Salesforce1: Create Broadcast Groups

Create broadcast groups right from mobile devices. Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can create posts. Group members can respond to posts. Creating broadcast groups is ideal when one person or a set of individuals regularly needs to share information with a large group of people. This option is available in all version of the Salesforce1 mobile app.

To enable broadcast groups, from Setup, enter **Group Layouts** in the **Quick Find** box, then add the **Broadcast Only** field. Broadcast Only will be added to the layout as a checkbox.

To create a broadcast group, create a public, private, or unlisted group and select Broadcast Only in the group settings. For more details, see Keep Discussions Focused with Broadcast Groups—Generally Available.

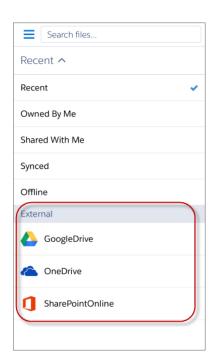
## Salesforce1: Access and Share External Microsoft and Google Files

If Salesforce Files Connect is set up for your organization, your mobile users can get more business-critical content at their fingertips. Starting with version 9.0 of the Salesforce1 for Android downloadable app, users can seamlessly access files in Microsoft SharePoint, OneDrive for Business, and Google Drive. Access to external data sources was previously available in the Salesforce1 downloadable app for iOS and the Salesforce1 mobile browser app.

When browsing the Files list, attaching files to records, or sharing files with groups or in the feed, users can access external files just as they do files stored in Salesforce. Relevant external files appear in the Files list when these filters are applied: Recent, Owned by Me, Shared with Me, or Following. If the Files list is collapsed, an External section lets users navigate directly to outside files.



Files Connect available in: Enterprise, Performance, Unlimited, and Developer Editions



External file sources are included in the Files list if your organization has Files Connect set up and you have connected file sources. See The Files Connect Setup Process in the Salesforce Help for more details.

SEE ALSO:

Salesforce1: Edit Microsoft Office 365 Files

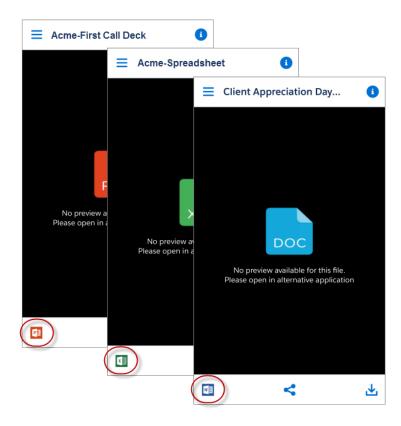
## Salesforce1: Edit Microsoft Office 365 Files

If Salesforce Files Connect is set up for your organization, your mobile sales reps can seamlessly access and edit Microsoft Office 365 files stored in SharePoint or OneDrive for Business—right from Salesforce1. This feature is now available in the Salesforce1 downloadable app for Android, version 9.0 or later, as well as the Salesforce1 for iOS download app, version 7.3 or later.

Salesforce1 users can access Excel, Word, and PowerPoint files from their Files list, open them directly in the appropriate Office 365 app, make edits, then save changes right there in the cloud so they're available in real time to other Salesforce users. And all it takes to switch back to Salesforce1 is a simple tap.



Files Connect available in: Enterprise, Performance, Unlimited, and Developer Editions



Office 365 files are included in the Files list if your organization has Files Connect set up and you have connected file sources. See The Files Connect Setup Process in the Salesforce Help for more details.

## Salesforce1: How to Begin Implementing Enhanced Security for Salesforce1 for Android with MDM

With the Salesforce1 downloadable app for Android, version 8.0 or later, you're able to tap into the enhanced security functions that come from combining Salesforce1 with an MDM solution. But since releasing the version 8.0 app, we've seen some head scratching about how to start implementing these features. There are a few pieces to the puzzle that require setup before diving into the Salesforce1 end of things. Let's get you pointed in the right direction.

First, configure Android for Work for your org. Android for Work is a program that supports enterprise use of Android devices. See Android for Work to learn more about the program and Android for Work Help for setup information.

Once Android for Work is set up, the next step is to configure your Mobile Device Management (MDM) suite. There are a multitude of MDM solutions in the market place. When you decide on the right product, work with your MDM provider to complete the configuration for your org.

After you have Android for Work and your MDM suite up and running in your org, you're ready to implement the enhanced security features of the Salesforce1 for Android app. To learn about configuring the key-value pair assignments for this functionality, see the MDM chapter in the *Salesforce1 Mobile Security Guide*.

## Salesforce1: Create and Edit Records While Offline Using Salesforce1 for Android (Pilot)

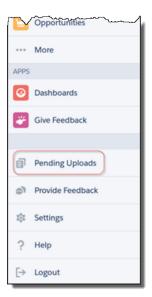
Your users' productivity doesn't have to stop when there's no mobile connectivity. Starting with version 9.0 of the Salesforce1 downloadable app for Android, your users can keep on truckin' with their work, whether they're in airplane mode 30,000 feet in the sky or deep underground in a subway tunnel.



**Note:** Offline Edit for Salesforce1 for Android, version 9.0 is available to all customers through a public pilot program. Offline Edit 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 timeframe or at all. Make your purchase decisions only on the basis of generally available products and features.

Offline Edit expands on the offline support your Salesforce1 for Android users are already using. Currently your Salesforce1 for Android users can cache their recently accessed records so they can view important details within the app without a network signal. And now, when you enable Offline Edit, your Salesforce1 for Android users can also create and edit recent records while offline.

When creating new records or updating existing records while offline, all changes are listed on the Pending Uploads page. This page is available from the Salesforce1 navigation menu.



When the user's mobile connectivity is restored, records listed on the Pending Uploads page are automatically synced with Salesforce. If there are any sync issues that require the user's attention—such as conflicting changes to the same record made by a different user—Salesforce1 for Android helps the user resolve the issues.

Because Offline Edit is a pilot feature, let's look at some important details before you take the plunge. Including how to enable enhanced offline support for your org.

#### SEE ALSO:

Enable Offline Edit for Salesforce1 for Android

Visual Indicators When Salesforce1 for Android Users Work Offline

Available Data and UI Elements When Salesforce1 for Android Is Offline

Offline Edit Limitations

#### Enable Offline Edit for Salesforce1 for Android

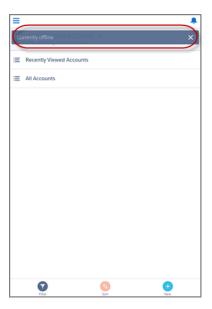
The Offline Edit feature for Salesforce 1 for Android, version 9.0 is available to all customers through a public pilot program. To get started, enable the feature for your org.

From Setup, enter Salesforce1 Offline in the Quick Find box, then click Salesforce1 Offline. On the Offline Settings page, select Enable offline create and edit in Salesforce1.

## Visual Indicators When Salesforce1 for Android Users Work Offline

How do Salesforce1 for Android users know if they're suddenly working online? How can users keep track of the records they've worked on while offline, and be confident that their updates make it back to Salesforce when they're online again? Let's look at the Salesforce1 visual indicators that answer these questions.

If a user's mobile device loses its network signal, a message briefly appears at the top of the screen.



The Pending Uploads page displays all the records that a user creates or edits while offline. This page uses several indicators to show the status of offline changes.

: Displays while the mobile device is offline. Indicates that there are changes to sync when the device goes back online. After successfully syncing, records disappear from the Pending Uploads page.

: Displays when the mobile device goes back online. Indicates that an unresolvable error occurred and the user's changes can't be saved

## Available Data and UI Elements When Salesforce1 for Android Is Offline

Offline Edit requires that caching for Salesforce1 is turned on for your org. As in the past, Salesforce1 for Android automatically caches a user's most recently accessed records for the objects listed in the Recent section of the Salesforce1 navigation menu, and a user's recent dashboards. A user's activities in both the mobile app and the full Salesforce site (whether Salesforce Classic or Lightning Experience) determine a user's recently accessed records. In addition, the app caches much of the data that a user accesses during a Salesforce1 session.

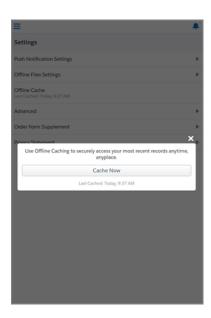
Cached data is encrypted and stored in a secure, persistent data store.

Here's the data and Salesforce1 elements that are available offline.

Navigation MenuYesGlobal SearchPrevious searches onlyNotificationsPreviously viewed onlyFeeds, Groups, and PeoplePreviously viewed onlySalesforce TodayMain page and mobile event records if previously viewSalesforce EventsPreviously viewed onlyRecent ObjectsYes (top five)Other ObjectsNoRecord DetailsYes (30 most recent records)Related RecordsPreviously viewed onlyList ViewsPreviously viewed onlyTasksOnly tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user manually updates the cacheApprovals (submit, approve, or reject)NoVisualforce pagesNoCanvas AppsNoLightning PagesNoSettingsYes	Salesforce1 Element	Available for Offline Use
Notifications Previously viewed only Feeds, Groups, and People Previously viewed only Salesforce Today Main page and mobile event records if previously view Salesforce Events Previously viewed only Recent Objects Yes (top five) Other Objects No Record Details Yes (30 most recent records) Related Records Previously viewed only List Views Previously viewed only Tasks Only tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user manually updates the cache  Approvals (submit, approve, or reject) No Visualforce pages No Canvas Apps No Lightning Pages	Navigation Menu	Yes
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Related Records Previously viewed only  List Views Previously viewed only  Tasks Only tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user manually updates the cache  Approvals (submit, approve, or reject) No  Visualforce pages No  Canvas Apps No  Lightning Pages No	Other Objects	No
List Views Previously viewed only  Tasks Only tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user manually updates the cache  Approvals (submit, approve, or reject) No  Visualforce pages No  Canvas Apps No  Lightning Pages No	Record Details	Yes (30 most recent records)
Tasks  Only tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user manually updates the cache  Approvals (submit, approve, or reject)  No  Visualforce pages  No  Canvas Apps  No  No  Lightning Pages  No	Related Records	Previously viewed only
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Canvas Apps No Lightning Pages No	Approvals (submit, approve, or reject)	No
Lightning Pages No	Visualforce pages	No
	Canvas Apps	No
Settings Yes	Lightning Pages	No
	Settings	Yes

Cached data is refreshed when a user switches to Salesforce 1. If a user switches to another app, the user's cached data is automatically refreshed if the existing data store is over one hour old.

Users can manually cache their data at any time—for example, before switching into airplane mode or entering an area with no service. From the Salesforce1 navigation menu, select **Settings** | **Offline Cache** | **Cache Now**.





**Note**: Depending on the complexity and size of a user's records, caching can take from a few seconds to a couple of minutes. We recommend that your users manually cache their records before going offline.

## SEE ALSO:

Salesforce Help: Salesforce 1 Mobile App Offline Access

## Offline Edit Limitations

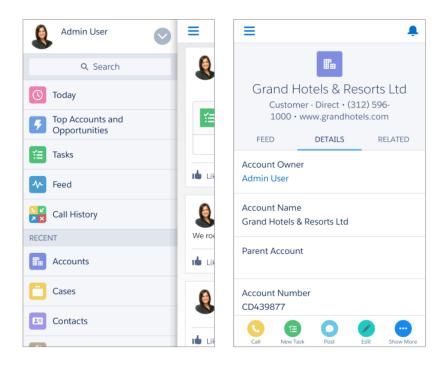
Offline Edit is available for Salesforce1 for Android, version 9.0 through a public pilot program. As this offline support isn't generally available yet, there are some limitations that you should review and prepare your users to expect.

- **New** and **Edit** actions work offline. But all other quick actions aren't supported when offline.
- Sales Path isn't supported when offline. If Sales Path is enabled for your org, opportunities aren't available offline.
- If your org has more than 15 record types for tasks, tasks aren't supported when offline.
- Lookup filters aren't supported when offline. Users can enter the name of the related lookup record when editing data offline but the app doesn't search for related looked records until the user's mobile device is back online.
- Dependent lookups and picklists for cached records aren't supported when offline, unless the user interacted with these elements before going offline.
- For performance reasons, if your org uses a lot of picklists or a very large number of fields on any of your objects' page layouts, records for those objects aren't cached for offline use. If a user doesn't see recently accessed records for an object when offline, this is likely the reason why.

We're actively working on resolving these issues so the Salesforce1 offline experience is seamless when we make Offline Edit generally available in the future.

## Salesforce1: New Color Palette for Salesforce1 for Android

The Salesforce1 downloadable app for Android, version 9.0 introduces a new color palette that provides a consistent look and feel with Lightning Experience. Same as with Lightning Experience, Salesforce1 for Android now uses white and cool-toned grays, injected with a hint of Salesforce blue, to create a lively and modern mood. The sparing use of color helps keep your content center stage and eliminates visual distractions for your users. This new color palette isn't yet available in the Salesforce1 downloadable app for iOS or the Salesforce1 mobile browser app.



Custom branding of Salesforce1 for Android is still supported and any custom branding that you've already applied is still there for your Android users after they upgrade to version 9.0. If your org hasn't already added its own unique stamp to Salesforce1, the new, neutral background of the mobile app gives you a great canvas from which to highlight your company's brand.

## Salesforce Differences from the Full Salesforce Site

The Salesforce 1 mobile app doesn't have all the functionality of the full Salesforce site, and also includes some features that aren't available in the full site. See if there are differences between Salesforce 1 and the full site for this release's new and enhanced features.



**Note:** For complete details about the differences for all features available in Salesforce1, see "Salesforce1 Limits and Differences from the Full Salesforce Site" in the Salesforce Help in the Salesforce online help.

## **Account Insights**

- When accessing Account Insights on a tablet device, users can't scroll through the available insights like they can in Lightning Experience. Instead, the device's screen size determines how many insights are displayed.
- When accessing Account Insights on a phone, only one insight is displayed at a time.

#### **Actions**

If you use URL custom buttons to pass parameters to standard pages in Salesforce Classic—such as pre-populating fields when creating a record—this behavior doesn't work in Salesforce1 or Lightning Experience.

#### **Assets and Work Orders**

These objects are fully supported in the Salesforce1 mobile browser app, but they aren't supported in any versions of the Salesforce1 downloadable apps for Android and iOS. Depending on the Salesforce1 for Android and Salesforce1 for iOS version, these objects may appear in the navigation menu but we don't recommend using them. There can be unexpected behavior on the Assets and Work Orders home pages. Plus some functionality isn't available, including: it's not possible to create assets or work orders, list views aren't available on these object home pages, nor do these objects appear in search results.

## **Enhanced Charts from Lightning Experience**

- Scatter and table charts aren't supported in Salesforce1 and appear as horizontal bar charts. Cumulative line charts aren't supported and appear as line charts.
- Enhanced charts show only the first 100 groupings in the under-laying report in the default sort order.
- You can't post enhanced charts to Chatter.

#### Files Without Chatter in the Salesforce 1 Mobile Apps

Spring '16 decouples Salesforce Files from Chatter. So it's now possible to use Files in the Salesforce1 mobile browser app, as well as the full Salesforce site, if your org has disabled Chatter. However, this enhancement isn't supported in the Salesforce1 downloadable apps for Android and iOS. Users of the downloadable apps can't access Files unless Chatter is enabled for your org.

## Salesforce 1 App Development Overview

Several Force.com platform enhancements support Salesforce1 development.

## Visualforce

#### Use User.UITheme and UserInfo.getUiTheme() to Determine User Experience Context

The User.UITheme and User.UIThemeDisplayed global variables and the UserInfo.getUiTheme() and UserInfo.getUiThemeDisplayed() Apex utility methods are improved to support the Salesforce1 mobile app and Lightning Experience.

# Salesforce Authenticator Mobile App, Version 2.0, for Two-Factor Authentication

We've completely reimagined, redesigned, and rebuilt the Salesforce Authenticator mobile app. Version 2.0 is a powerful and innovative two-factor authentication app for iOS and Android mobile devices. Not only does the new version of the app provide strong protection, it's also super easy to use. Your users enjoy enhanced security and increased convenience—all in one beautiful app. Salesforce Authenticator works for Lightning Experience, Salesforce Classic, and the Salesforce mobile app.

Many mobile authenticator apps generate verification codes that expire after a certain amount of time. When your users log in to an online account that requires two-factor authentication, they enter the code from the app along with their username and password. Like other mobile

EDITIONS

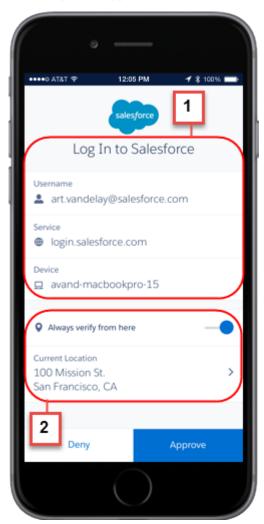
Available in: Group,
Professional, Enterprise,
Performance, Unlimited,
Developer, and Contact
Manager Editions

authenticator apps, Salesforce Authenticator generates codes for whenever your users need them. Version 2.0 of the app introduces features for added convenience, without sacrificing security.

When someone tries to log in or access restricted online data in a user's account, Salesforce Authenticator sends a notification to the user's mobile device.



Your user opens the app to see details of the online activity.



After checking the details (1), the user taps **Approve** to verify that the activity belongs to the user. Or if the activity isn't recognized, the user can tap **Deny** to block it. Salesforce Authenticator gives your users the option of flagging the blocked activity for a Salesforce admin to investigate. You can view users' verification attempts and the activities they flag for you in the new Verification History table in Setup.

When your users enable location services for Salesforce Authenticator, they unleash even more powerful features (2). If users are in their home or office, for example, they can tell Authenticator to verify their activities automatically from that trusted location. Automation gives your users the extra security of two-factor authentication, and they don't even have to take their phone out of their pocket.

Users download the app from the App Store for iPhones and Google Play for Android devices. Before your users can use Salesforce Authenticator for two-factor authentication, they have to connect the app to their online account. In Salesforce, your users can connect the app to their account in their personal settings. Connecting the app doesn't mean that your users are required to use two-factor authentication every time they log in. You set up the two-factor authentication requirement for your users in keeping with your company's security policies. If you set up a two-factor authentication requirement for users before they connect Salesforce Authenticator to their account, they're prompted to connect the app the next time they log in.

If your users already have version 1 installed on their mobile device, they can download the update from the App Store or Google Play. The update preserves the connected accounts that the user already has in the app. These accounts are "code-only" accounts that generate verification codes but do not receive push notifications or allow location-based automated verifications. Your users can recognize a code-only account on their Connected Accounts list in the app by the verification code that appears below the account name. The verification codes in these code-only accounts are valid until your users connect the new 2.0 functionality to their Salesforce account via their personal settings.



**Note**: Version 2.0 of the Salesforce Authenticator mobile app will be available from the App Store and Google Play following the completion of the Spring '16 Salesforce release to all production orgs on February 13, 2016. The app isn't available for preview or testing in sandbox orgs beforehand.

#### SEE ALSO:

Identity Verification Method Added for Two-Factor Authentication

Track User Identity Verifications

Salesforce Help: Salesforce Authenticator

Salesforce Help:Two-Factor Authentication

Identity Verification Method Added for Two-Factor Authentication

# SalesforceA

Manage users and view information for Salesforce organizations from your mobile device.

#### IN THIS SECTION:

## SalesforceA for iOS Version 3.1

Version 3.1 of SalesforceA for iOS is now generally available. You can now manage users' profiles on the go!

## SalesforceA for Android Version 3.0

Version 3.0 of SalesforceA for Android includes an entirely new user interface. The new layout lets you easily find the items you use most.

## SalesforceA for iOS Version 3.1

Version 3.1 of SalesforceA for iOS is now generally available. You can now manage users' profiles on the go!

When you view a user in SalesforceA for iOS version 3.1, you can manage the user's profile by tapping Edit.

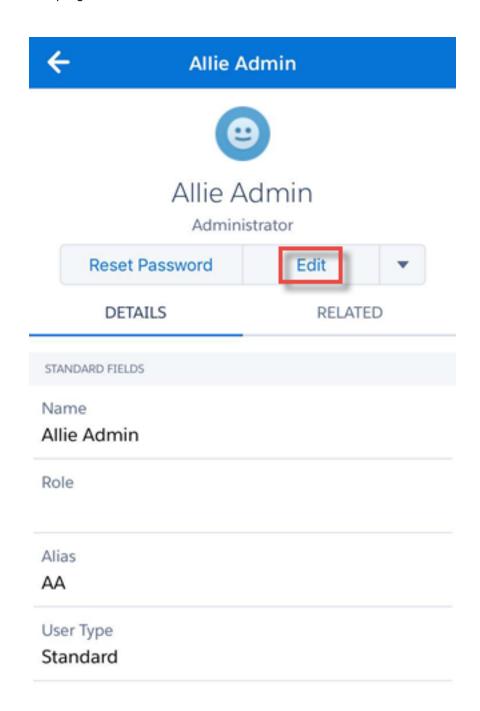
## EDITIONS

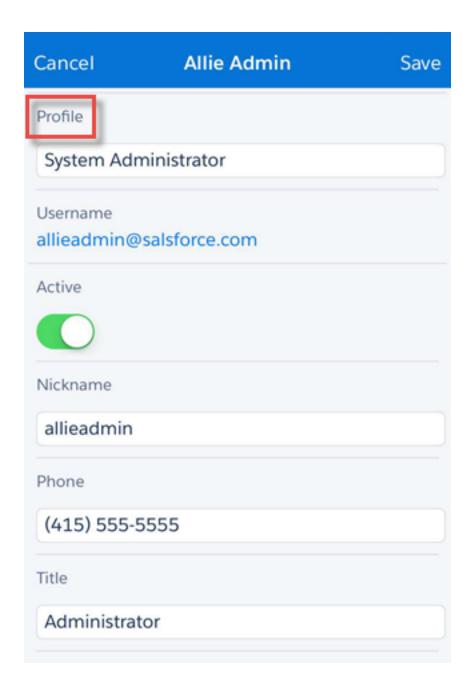
Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

## **USER PERMISSIONS**

To use SalesforceA:

"Manage Users"



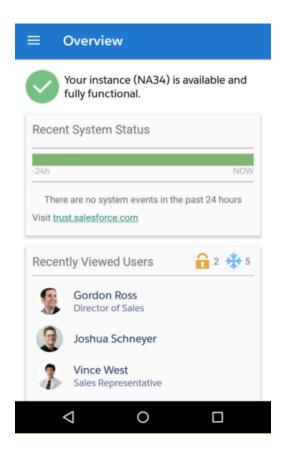


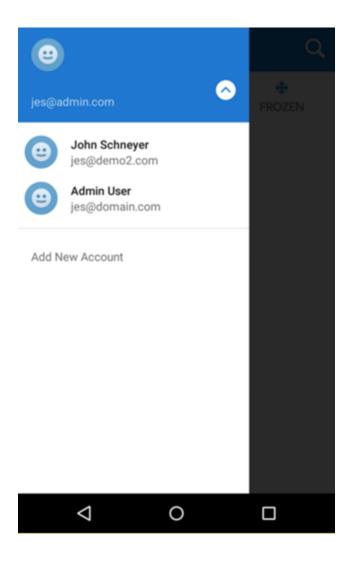
## SalesforceA for Android Version 3.0

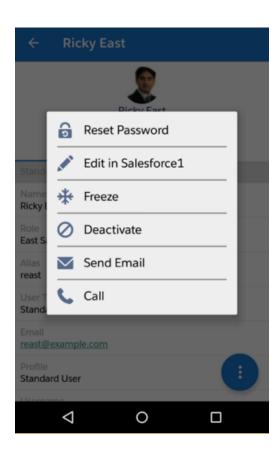
Version 3.0 of SalesforceA for Android includes an entirely new user interface. The new layout lets you easily find the items you use most. SalesforceA for Android version 3.0 is now built on the Salesforce Mobile Software Development Kit (SDK) as a native app for improved usability and performance. This version of SalesforceA requires Android OS version 4.4 or later.

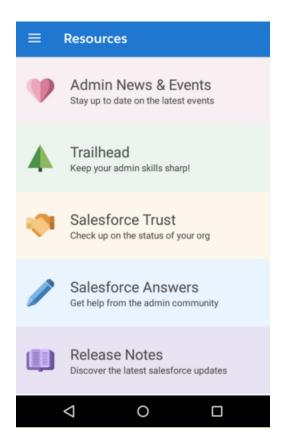
Note: Users that are unable to upgrade their mobile device to Android OS version 4.4 or later won't be able to use SalesforceA.

SalesforceA for Android version 3.0 still packs all the functionality you're used to, now in a refreshed user interface.









# Communities: Chatter in Communities, Template Improvements, Enhanced Moderation, and Much More

Spring '16 is packed with changes that make templates even more customizable. You can show more Salesforce data with custom object pages, create records using global actions, and manage your community's pages more easily. Plus, you can now add full Chatter capabilities to your community with Chatter Lightning components. These features are available in Salesforce Classic only. Other than in Setup, Communities is not supported in Lightning Experience.

# **EDITIONS**

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

## IN THIS SECTION:

## Why You Must Upgrade Your Community Templates in Spring '16

If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template, we strongly recommend that you update to the latest template version. Not sure what your template version is? Check the Settings area in Community Builder.

Customer support for older templates is being discontinued in the Summer '16 release (May 2016). Also, many powerful Community Builder and template features require the Winter '16 or Spring '16 template versions, so if you didn't upgrade in Winter '16, now is the time to do it.

#### We've Renamed Some Template Components

We know that finding the template components you need should be easy and intuitive. So, we renamed some of the components so that you can easily figure out what they are for. We also grouped the components by type in the Page Editor so that you know where to use them.

## Chatter in Community Templates

Chatter Lightning components for the community templates make it easy to add full Chatter capabilities to a community. With groups and profiles, you can create a much richer collaboration experience in the community. Individual Lightning components for features such as the feed, publisher, and groups mean that it's easy to completely customize where and how Chatter is integrated into the community.

#### Files in Communities

Using files in Communities is easier and more flexible than ever before! Attach multiple files to a single feed post, upload and select files in a unified flow, and preview files in the new Lightning multi-file preview player.

## **Community Templates**

We want your communities to be exactly what you envision. That's why we're giving you the power to create communities that are awesome. Last release we made community templates extensible, and this release we're making them even more flexible and customizable. You can now determine the level of record detail to include and where to display it. We've made it easier for your community members to navigate in your community, create and work with records, and find the topics they're interested in.

## Community Builder

Community Builder gives you more control over your pages with the enhanced Page Manager. You also get custom page layouts, an improved page loading experience for members, and better error handling for components.

## Community Setup

Communities Setup is now available in Lightning Experience! You also get limit increases, a streamlined setup for two-factor authentication, the ability to use Platform Encryption in your community, and much more.

### Community Management

Managing your community is now even easier than before. You can set up community file limits and now community moderation supports all feed types, special characters in your keyword lists, the API, and much more. To give you more control and flexibility with your community recommendations, you can now specify where your recommendations appear and target specific audiences.

#### Community Reports and Dashboards

Start the drum roll ladies and gents! You can now grant all your role-based external users permission to create and edit reports! You also get new custom report types and you can share Wave dashboards.

## Community Insights and Analytics

When you install the updated Salesforce Communities Management package from the AppExchange, you're in store for quite a magic trick. Community Management dashboards now display as Lightning dashboards—even if your org isn't using Lightning Experience. To top it off, you also get new and improved Insights reports.

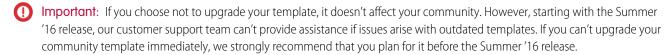
#### Other Changes in Communities

Other important changes to Communities include a limit increase, access to Notes and Attachments for users with a Customer Community license, more robust field-level security for guest users, and changes to how emails are sent for large community groups.

# Why You Must Upgrade Your Community Templates in Spring '16

If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template, we strongly recommend that you update to the latest template version. Not sure what your template version is? Check the Settings area in Community Builder.

Customer support for older templates is being discontinued in the Summer '16 release (May 2016). Also, many powerful Community Builder and template features require the Winter '16 or Spring '16 template versions, so if you didn't upgrade in Winter '16, now is the time to do it.



The latest versions of the Koa, Kokua, Napili, and Aloha templates use Lightning technology and components, which deliver better performance and a richer visual experience. You can edit all Koa, Kokua, Napili, and Aloha template pages and components directly in Community Builder. You no longer need to use Site.com Studio, except for a few site configuration settings.

A few things to keep in mind:

- This update affects communities that use the Koa, Kokua, Aloha, and Napili templates. Communities built using the Salesforce Tabs + Visualforce template aren't affected.
- Updating the template can have a different impact depending on the version your community currently uses.
  - If your community uses the Winter '16 Koa, Kokua, or Napili template, your customizations are maintained for all pages except the login pages, which retain branding but lose any custom code or component customizations.
  - If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template, most component
    customizations and properties are overwritten. For the Koa and Kokua self-service templates, general settings (such as Category
    Group Name, Top-Level Category, and Company Name) carry over. For Napili, topic definitions carry over.
    - Most branding properties defined using the Branding Editor in Community Builder are maintained. However, some community colors might be reset to the default values. After you update the template, check the branding properties and update any that were reset.

For more information, see Update Your Community's Template in Community Builderin the Salesforce Help.

• Template components introduced in Winter '16 and Spring '16 might not be compatible with older template versions. See "Which Components Can I Use with Each Template?" in the *Using Templates to Build Communities* guide.

## Compatibility with Lightning Experience

The Spring '16 versions of Koa, Kokua, Napili, Aloha, and Lightning Experience use the same underlying technology: the Lightning platform and Lightning components. That said, you aren't required to enable Lightning Experience in your organization to upgrade your community templates.

A few considerations of note if you're planning to enable Lightning Experience in your org:

- Salesforce Communities is available in Lightning Experience Setup, but it isn't fully supported in Lightning Experience. Lightning
   Experience doesn't support the global header, so internal users in your org can't switch between the Salesforce org and their
   communities from Lightning Experience. If you enable Lightning Experience in your organization, internal users must switch back
   to Salesforce Classic to access the global header.
- Enabling Lightning Experience doesn't change the look and feel of communities that use the Salesforce Tabs + Visualforce template, which uses the Salesforce Classic styling by default.

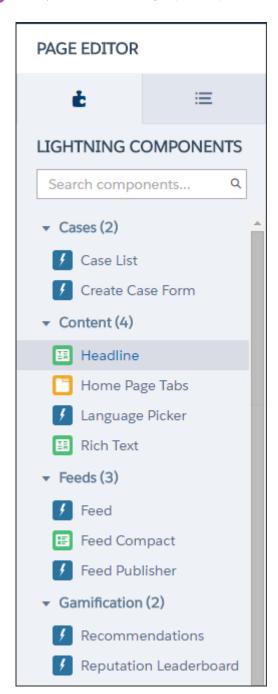
# We've Renamed Some Template Components

We know that finding the template components you need should be easy and intuitive. So, we renamed some of the components so that you can easily figure out what they are for. We also grouped the components by type in the Page Editor so that you know where to use them.

Old Component Name	New Component Name
Single Article View	Article Content
Case Publisher	Case Comments Publisher
Case Highlights	Case Banner
Case Status Button	Set Case Status Button
My Cases	Case List
Case Creation	Create Case Form
Case Chatter Publisher	Case Feed Publisher
Home Tabs	Home Page Tabs
Topic Trending Articles	Trending Articles by Topic
Results List	Search Results
Ask the Community	Ask Button
Feed Item Detail	Feed Posts & Comments
Related Topics	Related Topics List
User Profile Header	User Profile Image
User Profile Body	User Profile Detail
User Profile Detail	User Profile Summary
User Profile Header Detail	User Profile Summary & Image
Call to Action Section	Contact Support & Ask Buttons

Old Component Name	New Component Name
Record Information	Record Information Tabs
Record Headline	Record Banner
Record Home List View	Record List

**Example:** Renamed and regrouped components in the Community Builder.



# Chatter in Community Templates

Chatter Lightning components for the community templates make it easy to add full Chatter capabilities to a community. With groups and profiles, you can create a much richer collaboration experience in the community. Individual Lightning components for features such as the feed, publisher, and groups mean that it's easy to completely customize where and how Chatter is integrated into the community.

#### IN THIS SECTION:

#### Add Groups to Drive Collaboration in Your Napili Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Napili community. Use the out-of-the-box design for groups in Napili, or create your own customized version of the group detail page using separate components.

## New User Profile Component

It's a bird, it's a plane, it's the new User Profile super component! The User Profile component uses a two-column layout to include everything your users need to know about other users: contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers. This new component is included by default in all communities created with the Napili template in Spring '16 or later.

#### Show Users' Related Lists on Profiles

It's convenient for users to see all their information in one place. Add the User Profile Related List component to your User Profile page so that users can see their related lists. Related lists include files, groups, followers, and who they're following.

## Mix-and-Match Feed Components to Meet Your Community's Needs

Easily add the power of the feed to your Napili community pages with the new Feed Publisher, Feed, and Feed Compact components. Use them with any object that supports feeds, such as topics, groups, user profiles, accounts, and cases, and for the overall community discussions tab on the Community home page. Then sit back and watch as your community starts interacting and collaborating.

## Rich Text Editing and Link Previews in the Publisher

The publisher now supports rich text editing and rich link previews in communities that use the Napili template.

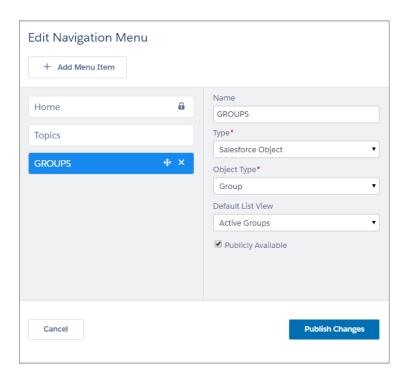
# Add Groups to Drive Collaboration in Your Napili Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Napili community. Use the out-of-the-box design for groups in Napili, or create your own customized version of the group detail page using separate components.



Note: This functionality requires the Winter '16 or later version of the Napili template.

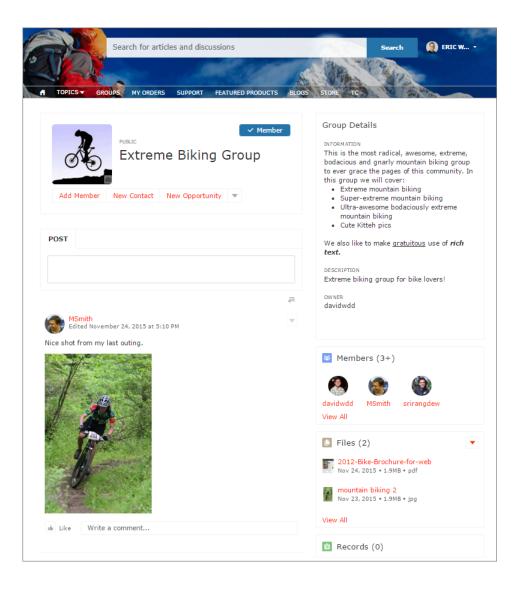
To enable groups in your community, add groups to the community navigation menu. This automatically displays a menu item that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of groups.



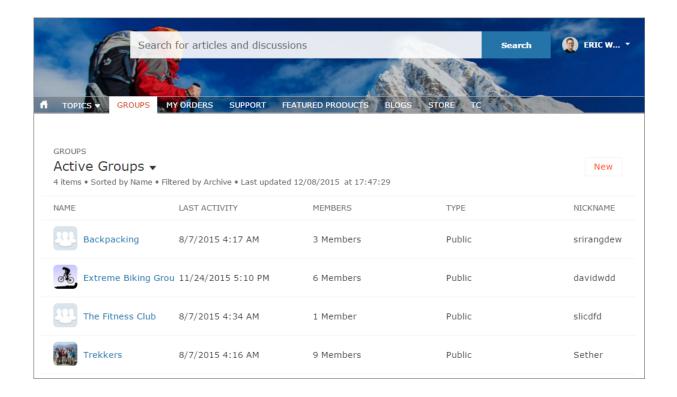
When users click on the name of an active group in the community, they're redirected to the group detail page. If it's a private group, they're asked to log in. Only logged-in group members can view private group content.

A few things to keep in mind:

- When you enable groups in your community, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and the group feed. We recommend using this composite component, especially if you want your community pages to be responsive across desktop and mobile device browsers.
- If you prefer to use a different layout or want more granular control over the placement of group content, create a custom community page and use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages might not be responsive across all devices.
- Group announcements aren't supported in communities.
- **Example**: Group in a Napili community.



Group list in Napili community.



## **New User Profile Component**

It's a bird, it's a plane, it's the new User Profile super component! The User Profile component uses a two-column layout to include everything your users need to know about other users: contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers. This new component is included by default in all communities created with the Napili template in Spring '16 or later.

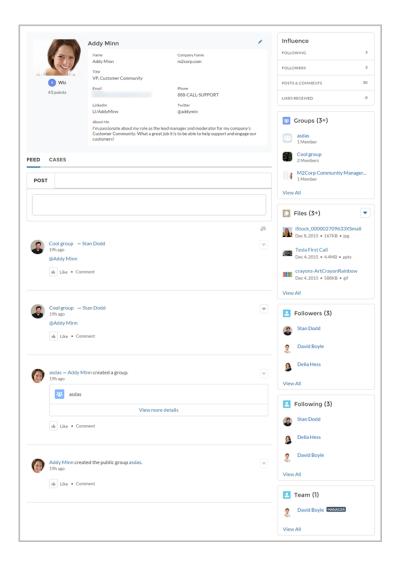
The User Profile component includes all the useful features we provide for user profiles, but you can customize it to meet your community needs. Profile details and the profile image are always shown, but you choose if you want to show related lists, Chatter statistics, and Knowledgeable About. You can also customize labels.

The layout of the component also makes it ideal for viewing your community on a mobile device. When viewed on a mobile device or tablet, the component uses a single column layout that includes four tabs: Feed, Cases, Details, and Related. The Cases tab is only visible when a user views their own profile. You can edit all tab labels.

If you prefer to use a different layout or want more granular control over the placement of user profile content, create a custom community page and use the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knowledgeable About, and User Profile Related List components.



**Example**: User Profile component



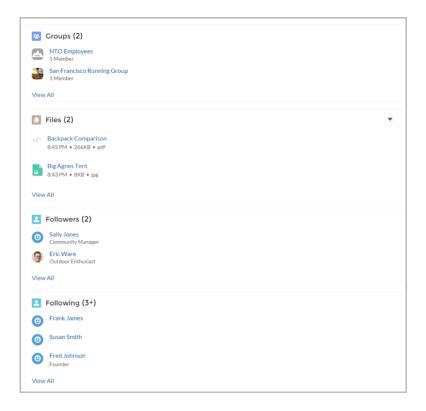
## Show Users' Related Lists on Profiles

It's convenient for users to see all their information in one place. Add the User Profile Related List component to your User Profile page so that users can see their related lists. Related lists include files, groups, followers, and who they're following.

Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click upload a file.

Customize which related lists are visible in your community by editing the User Profile page layout in your internal Salesforce org Setup.

**Example**: Sample User Profile Related List component:

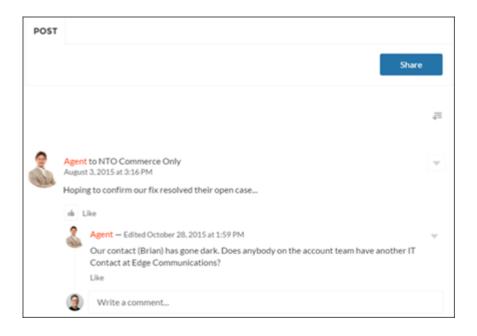


# Mix-and-Match Feed Components to Meet Your Community's Needs

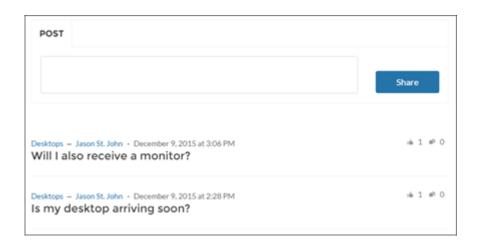
Easily add the power of the feed to your Napili community pages with the new Feed Publisher, Feed, and Feed Compact components. Use them with any object that supports feeds, such as topics, groups, user profiles, accounts, and cases, and for the overall community discussions tab on the Community home page. Then sit back and watch as your community starts interacting and collaborating.

Previously, feeds and the feed publisher could only be used together as part of the Record Information Tabs component on record detail pages. Having these components as discrete entities gives you more flexibility as to the placement and use of feeds in your Napili community.

- Add the Feed Publisher component to community pages to let members start discussions.
- Need a full listing of all posts, comments, and questions in your overall community discussion? Use the Feed component.
- Want a scannable view with just the question titles in the feed? Use the Feed Compact component.
  - Mote: The Feed Compact component doesn't support feed filters and only displays question posts.
- Example: Feed and Feed Publisher



### **Feed Compact and Feed Publisher**



# Rich Text Editing and Link Previews in the Publisher

The publisher now supports rich text editing and rich link previews in communities that use the Napili template.

Both the Feed Publisher component and the Ask a Question publisher support this functionality. This allows community members to create feed posts with bold, italic, and other rich text formatting when they post questions or regular posts in a community. Posts that contain rich media links are converted into embedded videos, images, and rich article previews.

# Files in Communities

Using files in Communities is easier and more flexible than ever before! Attach multiple files to a single feed post, upload and select files in a unified flow, and preview files in the new Lightning multi-file preview player.

#### IN THIS SECTION:

#### Lightning File Preview Player Now Available in Communities

The same fast, beautiful file previews we brought to Lightning Experience in Winter '16 are now available in Communities!

### Attach Multiple Files to a Single Post

Now community users can add up to five files to a single feed post.

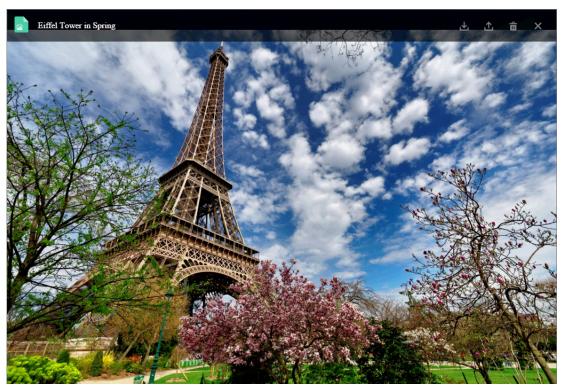
### Unified File Selection in Communities

When community users attach files to their posts, they can now get to all their files in a unified flow. No need to go down two different paths when uploading files and selecting files from the community.

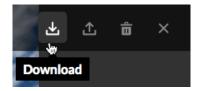
# Lightning File Preview Player Now Available in Communities

The same fast, beautiful file previews we brought to Lightning Experience in Winter '16 are now available in Communities!

The new SVG file preview player makes your images, documents, and other files come alive in your browser without downloading a thing! Scroll through multi-page files. Click through your file in full-screen presentation mode. Play your GIFs. Enjoy the rich render quality on high-res displays. No need to install Adobe Flash Player to preview your files, since it's not SWF-based.



We've kicked it up a notch for Communities: view multiple files in the preview player! When multiple files are attached to a feed post, you can preview all of them - one at a time, in the same window.



Want to do more than just preview your file? All your actions are right there in the preview window. Upload a new version, delete, download, and view file details. You can get it all done in one place.

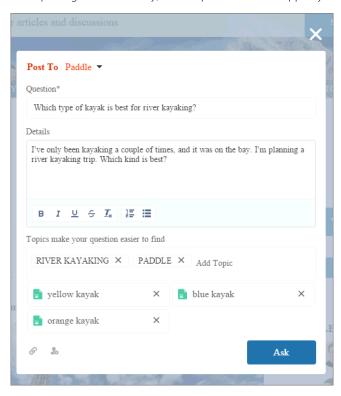
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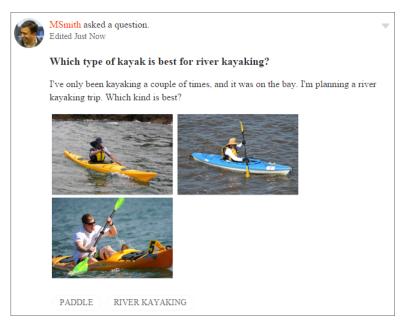
Sometimes a picture is worth a thousand words, but other times it takes five pictures to get a point across. Do your community users find themselves creating multiple posts just so they can share several related images or other files? Do they want to add more than just one file to a single question? Now they can! Here's what your community users can look forward to:

- Attach multiple files in the feed publisher
- View multiple file thumbnails in the feed
- Page through multiple files in the new file previewer

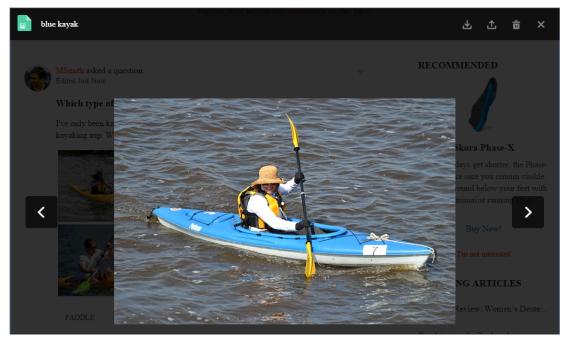
When posting in a community, attach up to five files to support your question.



Community viewers can see thumbnails for the files in the feed.



Click any thumbnail to view the files in the new multi-file previewer. From there, you can click through all the files in the post, download each file, and access other quick actions in the toolbar.

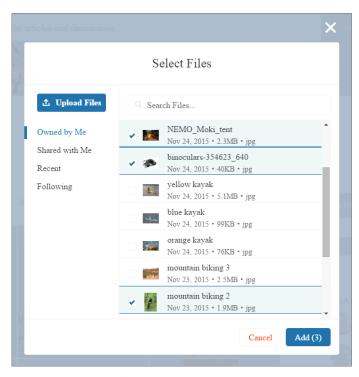


Multiple file attachments are supported in Chatter REST API, Chatter in Apex, and SOAP API.

## **Unified File Selection in Communities**

When community users attach files to their posts, they can now get to all their files in a unified flow. No need to go down two different paths when uploading files and selecting files from the community.

Upload files, select files that have already been uploaded in the community, and browse filter views such as Owned by Me and Recent.



With the new multiple-file attach feature in question posts in Communities, unified file selection means that users can upload and select files in the same feed post. Users can click the paperclip multiple times to attach up to five files per post. The paperclip icon in feed posts now goes directly to this view of all files. Previously, there were two divergent paths for uploading and selecting files. Now it's easy to share several files with your community at once, regardless of where those files are located.

# **Community Templates**

We want your communities to be exactly what you envision. That's why we're giving you the power to create communities that are awesome. Last release we made community templates extensible, and this release we're making them even more flexible and customizable. You can now determine the level of record detail to include and where to display it. We've made it easier for your community members to navigate in your community, create and work with records, and find the topics they're interested in.

### IN THIS SECTION:

### Extended Records Functionality in Napili

Allow your community members to do even more with records in your Napili community. A new record list and detail components makes it easier for you to provide your members with the data they need most. We've also extended the support for more objects.

#### Improved Navigation for Community Users

The community navigation menu just got better! The navigation menu now supports groups, leads, and opportunities. But, wait, there's more!

### Topics, Subtopics, and the Topic Catalog

Add subtopics straight from the UI to provide a more structured and granular community navigation, allow community members to view all the community topics in a single view in the topic catalog, and more.

#### Extensible Aloha Template with Lightning Components

The Aloha template is now fully extensible, like the Koa, Kokua, and Napili templates. Go beyond the preconfigured template functionality to create pages, customize the App Launcher and other components, add custom components, and provide navigation. In your community, members can drag apps to reorder them in the App Launcher.

#### **Enhanced Leaderboard Drives More Engagement**

Members in a community want to know where they stand among the pack. They also need to know who is the most knowledgeable on a particular topic. The Leaderboard in Napili templates is now customizable. You can let your members see how they rank within the community, what other users are knowledgeable about, or when a user was last active.

### Endorse Knowledgeable Members from a Community User Profile Page

Your community members can now recognize experts using the Knowledgeable About widget directly on a member's user profile page. When you enable Knowledgeable People in your community, members can endorse one another directly on user profiles.

### Enrich Your Community with Images and Videos

We've revamped the Rich Text component, so now you can include images and embedded videos with your formatted text. And with the option to resize the dialog box, it's now much easier to use.

### Easy Account Access for External Users

External users can now access their account right from the community. The My Account link in the User Profile Header menu takes the user to their account record, so they can view and update their information. Previously, external users didn't have an easy way to access their account in the community.

### Easily Change Email and Password in the Community

Users can now change their email address and password right in the community from the My Settings page!

# Extended Records Functionality in Napili

Allow your community members to do even more with records in your Napili community. A new record list and detail components makes it easier for you to provide your members with the data they need most. We've also extended the support for more objects.

#### IN THIS SECTION:

#### Allow Community Members to Create Records

Bring global actions to your community pages! Allow community members to create records from any community page with a convenient button click.

#### Community Members Can Access More Actions on Records

Use more record actions from the record banner and record related lists on the record detail page in Napili.

### New-and-Improved Record List Component

The Record List component, previously known as Record List View, is now available in Full and Compact layouts so you can choose the one that best meets your community needs. The Record List component now supports groups, leads, and opportunities, in addition to accounts, cases, contacts, and custom objects. You can also add the Record List component to any page in your community.

## Customize Tabs in the Record Information Tabs Component

Hide and rearrange tabs in the Record Information Tabs component to meet your community's needs.

#### Display Record Details Where You Need Them Most

See all the important information about your accounts, cases, and other records in your Napili community. Simply drag the Record Detail component on a record detail or a custom page, and it populates with record information stored in Salesforce. This component is a great way to share information with community members who need it most, like partners.

### Show Related Record Data on Community Pages

Want to share related record lists in a community without the other record details? Use the Record Related List component on a custom page. Previously, you could only use the Record Information Tabs component to show related lists, which also include the record details and the record feed.

### Napili Now Supports Even More Objects

Need to share leads and opportunities with partners? No problem! Always wanted to share campaigns with a community member? We've got that covered too. We've added support for a whole slew of new objects starting in Spring `16.

### Lookup Fields on Records

You can add lookup fields to the Koa, Kokua, and Napili templates so that community members, including guest users, can view or edit more data from your communities. This is especially useful for community members who access case or contact data for self service, or create cases with the Contact Support component.

## Allow Community Members to Create Records

Bring global actions to your community pages! Allow community members to create records from any community page with a convenient button click.

- Note: This functionality requires the Winter '16 or later version of the Napili template.
- 1. Add the Create Record Button component to a community page. For example, add it to the Home page to make it easy to find.
- 2. In the Property Editor, add the global actions that you want to expose in the community and save your changes. These global actions are the same ones used by the publisher in the internal Salesforce org. You can configure their labels, layout, and fields in Setup.

After you associate a list of global actions with the button, it behaves like a drop-down menu. When community members select and click an action from the button, they are redirected to the Create New page, which uses the Create New Record Form component. This page dynamically picks up the global action layout associated with the clicked action and displays the appropriate record fields when the page loads.

A few things to keep in mind:

- You can add up to 20 global actions to the button.
- The following objects are supported in communities: accounts, cases, contacts, leads, opportunities, tasks, events, campaigns, campaign members, and custom objects.
- You can't use the Create Record Form component on custom pages.

## Community Members Can Access More Actions on Records

Use more record actions from the record banner and record related lists on the record detail page in Napili.

- Note: This functionality requires the Winter '16 or later version of the Napili template.
- **Record banners**: Community members with the necessary permissions can follow the record and use the quick actions defined for the object from the record banner on a record detail page. Previously, they could only edit and delete records. You can define the quick actions for each object on the object page layout in Setup, and then assign those layouts to the community user profiles. We recommend including quick actions only for the objects supported on Napili.
- **Related record lists**: Users can now access row-level actions (edit, delete, and so on) from related record lists. Previously, related record lists only supported the creation of new related records for supported objects.
- Mote:
  - Custom Visualforce actions aren't supported.
  - Community members can't access record details for unsupported objects, so we recommend that you minimize the use of
    unsupported objects in your community. Consider removing unsupported objects from related record lists and quick actions
    when you define the page layout for each object you expose in the community.

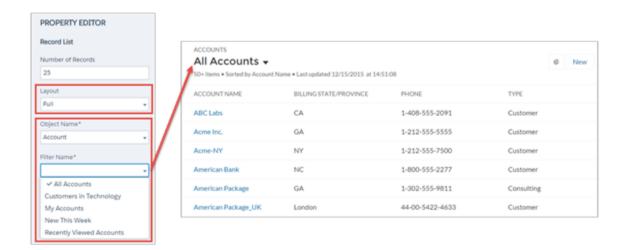
## New-and-Improved Record List Component

The Record List component, previously known as Record List View, is now available in Full and Compact layouts so you can choose the one that best meets your community needs. The Record List component now supports groups, leads, and opportunities, in addition to accounts, cases, contacts, and custom objects. You can also add the Record List component to any page in your community.



Note: This functionality requires the Spring '16 or later version of the Napili template.

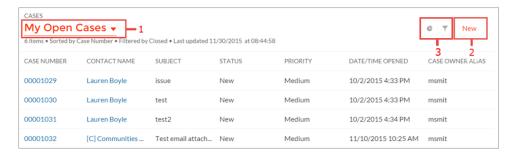
When creating a record list, you select the object to use. After you select the object, the Filter Name field automatically populates with the available related lists. This example shows a record list for the Account object using the Full layout and the All Accounts related list.



The compact layout is ideal for showing short lists of information in a narrow column or when displaying your community on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically switches to the compact layout.

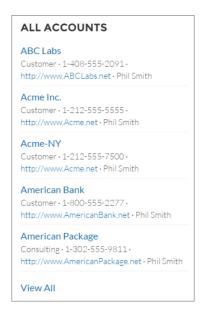
When choosing the layout for Record List components in your community, consider the following:

- Compact layout works in any size column. For full layout, use a column width of at least 50% of the page.
- If using the full layout, we recommend that you don't place a component below the Record List component on the page.
  - Full layout has a minimum height of 700 pixels. If you place a component below the full layout of the Record List component, the Record List component may overlap the component below.
  - Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling may prevent you from
    ever seeing the component below the Record List component.
- The maximum number of items in a Compact layout is 100. The maximum number per page in the Full layout is 100.
- Example: Sample Record List component (Full layout):



- Use the menu (1) to change the list view.
- Use the New button (2) to create a record. A window pops up where a user can enter and save record details.
- Use the buttons (3) to filter the list view or view related charts. Because external community users can't be assigned the "Create and Customize List Views" permission, they can't filter list views.

Sample Record List component (Compact layout):



## Customize Tabs in the Record Information Tabs Component

Hide and rearrange tabs in the Record Information Tabs component to meet your community's needs.



**Note:** This feature requires the Winter '16 or later version of the template.

Previously, by default the Record Information component showed three tabs in a set order: record details, related records, and the feed related to the record. You can now switch the order of the tabs, and even hide tabs your community doesn't use.

## Display Record Details Where You Need Them Most

See all the important information about your accounts, cases, and other records in your Napili community. Simply drag the Record Detail component on a record detail or a custom page, and it populates with record information stored in Salesforce. This component is a great way to share information with community members who need it most, like partners.



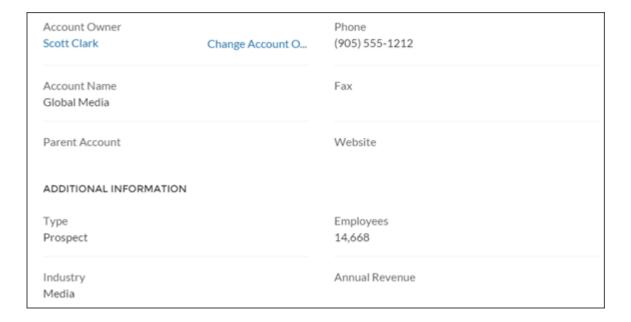
Note: This feature requires the Winter '16 or later version of the template.



**Example**: Here is an example of an account detail page in Salesforce Classic.



And here is the same account information in a Napili community.



## Show Related Record Data on Community Pages

Want to share related record lists in a community without the other record details? Use the Record Related List component on a custom page. Previously, you could only use the Record Information Tabs component to show related lists, which also include the record details and the record feed.



Note: This feature requires the Winter '16 or later version of the template.

## Napili Now Supports Even More Objects

Need to share leads and opportunities with partners? No problem! Always wanted to share campaigns with a community member? We've got that covered too. We've added support for a whole slew of new objects starting in Spring `16.

- Campaign
- CampaignMember
- CollaborationGroup

- Lead
- Notes
- Opportunity
- OpportunityContactRole
- OpportunityLineItem
- OpportunityTeamMember
- ProcessInstanceHistory
- ProcessInstanceStep
- ProcessInstanceWorkitem
- User

Previously, the Napili template supported the following objects: accounts, cases, contacts, events, tasks, and custom objects.

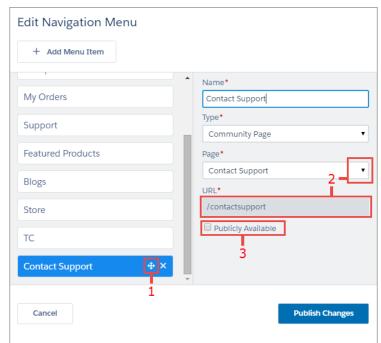
## Lookup Fields on Records

You can add lookup fields to the Koa, Kokua, and Napili templates so that community members, including guest users, can view or edit more data from your communities. This is especially useful for community members who access case or contact data for self service, or create cases with the Contact Support component.

Users can access data based on the permissions they're given to lookup fields on page layouts. Lookup fields aren't supported for custom objects or template-based communities created before Spring '16. The Create New option for lookups is not supported for the Napili template, and only external users (not guest users) can access asset lookup fields.

# Improved Navigation for Community Users

The community navigation menu just got better! The navigation menu now supports groups, leads, and opportunities. But, wait, there's more!



Check out these other improvements:

- Get your navigation in exactly the right order by dragging items up or down (1).
- When creating a navigation item for a community page, you can easily select from a drop-down menu of all your community pages (2). The URL is automatically populated.
- We know you value security, so we changed the default setting for the Publicly Available checkbox so that it's unchecked by default (3).
- Use the API to manage your navigation menu. See NavigationLinkSet and NavigationMenuItem in the API release notes.

# Topics, Subtopics, and the Topic Catalog

Add subtopics straight from the UI to provide a more structured and granular community navigation, allow community members to view all the community topics in a single view in the topic catalog, and more.

#### IN THIS SECTION:

### Set Up Subtopics to Structure Napili Community Navigation

Create parent-subtopic relationships for navigational topics to provide more granular navigation paths in your Napili community. You can add topics and subtopics from the Navigational Topics node in the Community Management page. Previously, you could create subtopics only via the API.

### See Your Community's Organized Content in the Topic Catalog

You can see a full listing of all your topics and subtopics in the topic catalog if you organize your Napili community's content with navigational parent and subtopics. Members can access the topic catalog by clicking the More Topics link in the Topics area of the navigation menu.

#### Help Members Discover Content with Topic Recommendations

We've added the ability for your community users to discover which topics are being followed and discussed in the community with topic recommendations.

### Quickly Search Articles and Apply Topics in Your Community

Use the search bar in the Article Management node of Community Management to quickly find articles when you're associating them with topics.

## Set Up Subtopics to Structure Napili Community Navigation

Create parent-subtopic relationships for navigational topics to provide more granular navigation paths in your Napili community. You can add topics and subtopics from the Navigational Topics node in the Community Management page. Previously, you could create subtopics only via the API.

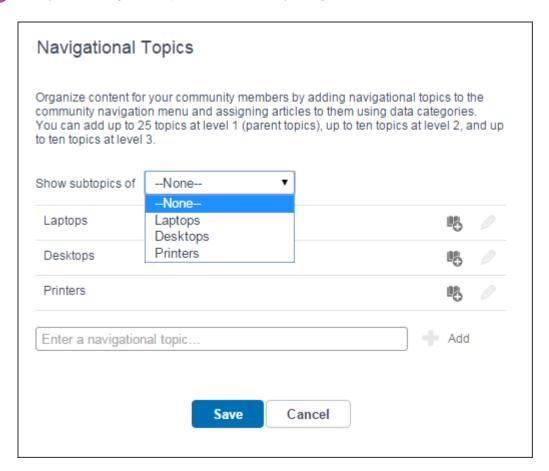
The following is the maximum number of navigational topics and subtopics you can have in a Napili community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

You can view all the navigational parent and subtopics in one place in the community's Topic Catalog.



**Example**: The Navigational Topics node in Community Management.



SEE ALSO:

Salesforce Help: Set Up Navigational Topics

## See Your Community's Organized Content in the Topic Catalog

You can see a full listing of all your topics and subtopics in the topic catalog if you organize your Napili community's content with navigational parent and subtopics. Members can access the topic catalog by clicking the More Topics link in the Topics area of the navigation menu.

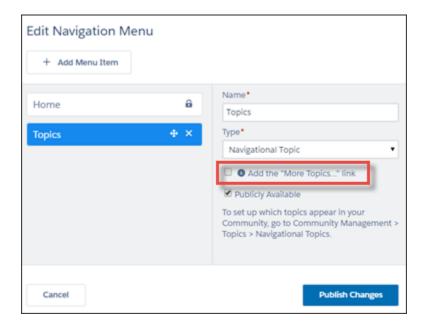
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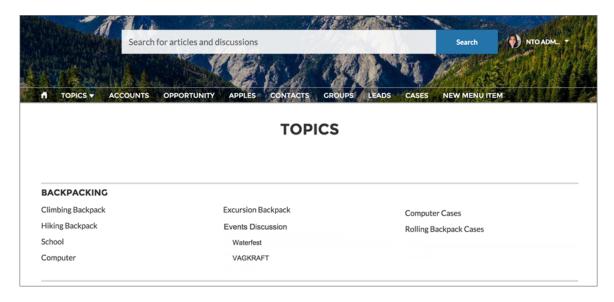
Note: The topic catalog is only visible after you've set up navigational topics in your community.

To add the topic catalog to your community, select the **Add the "More Topics..." link** checkbox when you edit the Navigation Menu in Community Builder.









#### SEE ALSO:

Salesforce Help: Update Your Community's Template

Salesforce Help: Change Your Community Template

Salesforce Help: Considerations for Changing Your Community Template

## Help Members Discover Content with Topic Recommendations

We've added the ability for your community users to discover which topics are being followed and discussed in the community with topic recommendations.

Popular topics, such as topics with many followers or topics that appear on posts with many likes, are recommended to community users. A widget on the homepage displays the recommended topics, and members can click each topic to discover more.





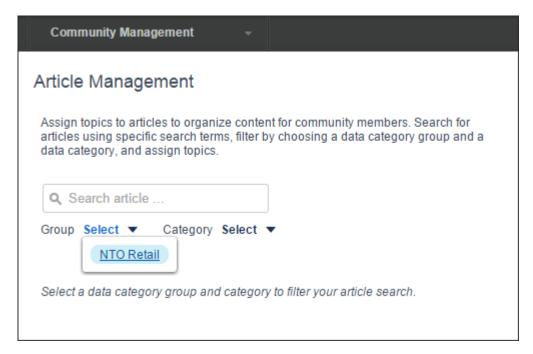
Topic recommendations are supported in Chatter REST API and Chatter in Apex.

# Quickly Search Articles and Apply Topics in Your Community

Use the search bar in the Article Management node of Community Management to quickly find articles when you're associating them with topics.

Previously, you had to choose a data category and a specific category to find articles.





SEE ALSO:

Salesforce Help: Add Topics to Articles or Remove Them

# Extensible Aloha Template with Lightning Components

The Aloha template is now fully extensible, like the Koa, Kokua, and Napili templates. Go beyond the preconfigured template functionality to create pages, customize the App Launcher and other components, add custom components, and provide navigation. In your community, members can drag apps to reorder them in the App Launcher.



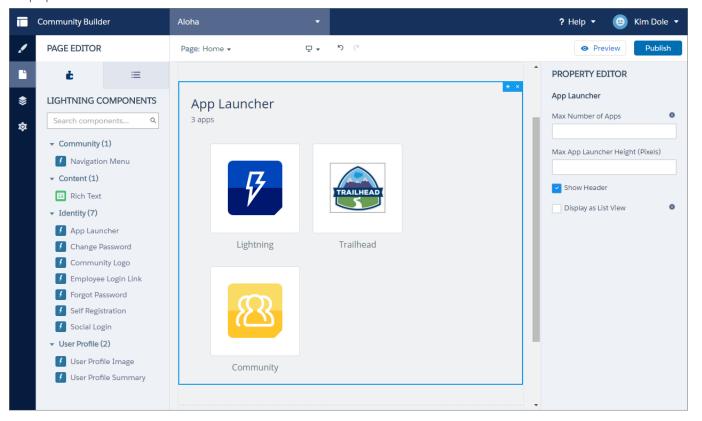
Note: This feature requires the Spring '16 version of the Aloha template.

To create a page in your Aloha community, click in the Page Manager. You can use one of the Aloha pages as a template or create a blank page with columns.

Work with Lightning components just as you do in the other templates. You can add, remove, or modify the properties of the Lightning components in Community Builder.

We strongly recommend that you upgrade your Aloha template at the earliest because we're retiring support for templates that don't support Lightning components in Summer '16 (May 2016). For details, see Why You Must Upgrade Your Community Templates in Spring '16.

Example: Here's a sample configuration of the App Launcher component on the Home page with the list of supported components and properties.



#### SEE ALSO:

Salesforce Help: Update Your Community's Template Salesforce Help: Community Builder Overview

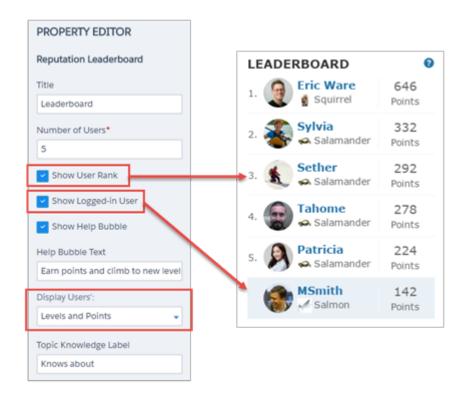
# **Enhanced Leaderboard Drives More Engagement**

Members in a community want to know where they stand among the pack. They also need to know who is the most knowledgeable on a particular topic. The Leaderboard in Napili templates is now customizable. You can let your members see how they rank within the community, what other users are knowledgeable about, or when a user was last active.

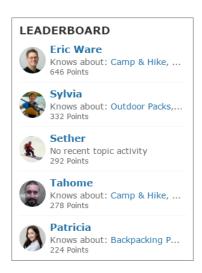
You can also choose to show a help icon with customizable text so that members understand what it takes to get listed on the leaderboard.



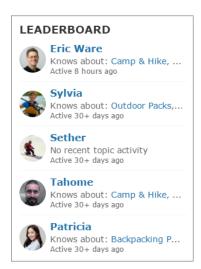
Example:



### **Display Users': Topics and Points**



Display Users': Topics and Last Active



# Endorse Knowledgeable Members from a Community User Profile Page

Your community members can now recognize experts using the Knowledgeable About widget directly on a member's user profile page. When you enable Knowledgeable People in your community, members can endorse one another directly on user profiles.

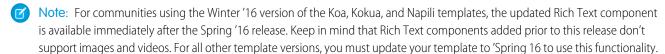
Community members can endorse one another for topics that exist in the community. The user profile page displays all the topics the community member is knowledgeable about, and the number of endorsements received for each topic.

- Note: Community members can't endorse themselves.
- Example: Knowledgeable about widget on a user profile

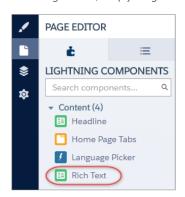


# Enrich Your Community with Images and Videos

We've revamped the Rich Text component, so now you can include images and embedded videos with your formatted text. And with the option to resize the dialog box, it's now much easier to use.



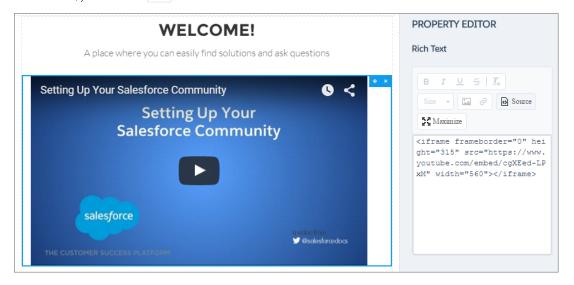
In the Page Editor, simply drag a Rich Text component from the Content section of the Lightning Components tab onto the page.



Using the Property Editor, you can add images (1), insert source code (2) to embed a video, and expand the dialog box (3) to access more options.



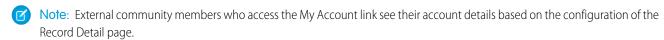
**Example:** To embed a video such as a YouTube video, click **Source** and add the embed code. Alternatively, when the dialog box is maximized, you can click to add the iframe information.



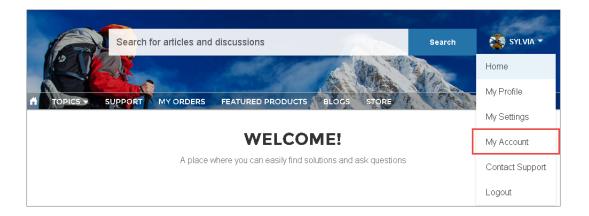
# Easy Account Access for External Users

External users can now access their account right from the community. The My Account link in the User Profile Header menu takes the user to their account record, so they can view and update their information. Previously, external users didn't have an easy way to access their account in the community.

The My Account link is available in communities created using the Napili template.



**Example:** 



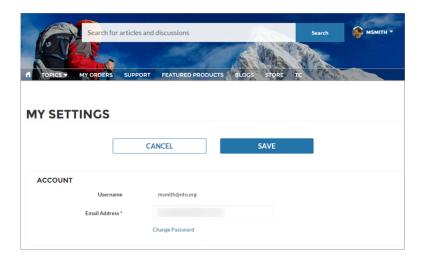
# Easily Change Email and Password in the Community

Users can now change their email address and password right in the community from the My Settings page!

Logged-in users see an Account section in the My Settings menu. Under the hood, this menu uses the User Settings component of the Napili template and includes a Username field, Email Address field, and a Change Password link. The email address and password are editable, but users can't change their username.

0

**Example:** My Settings Component with the Account Section



# Community Builder

Community Builder gives you more control over your pages with the enhanced Page Manager. You also get custom page layouts, an improved page loading experience for members, and better error handling for components.

#### IN THIS SECTION:

### Manage Pages More Easily with the Enhanced Page Manager

Page management in Community Builder just got a whole lot easier! Not only can you select the active pages for your community, now you can create and delete pages, add page variations, and access page properties.

### Make the Most of Your Data with Improved Page Creation

As part of the Page Manager enhancements, we've improved the way you create custom pages for your communities. And in the Napili template, you can now create custom record list and related list pages to get the most from your Salesforce data.

### Change Things Up with New and Custom Layouts

We've added some new layouts to make it easier to quickly change the look of your community's pages. You can even create your own custom layouts in the Developer Console and import them to use in your community!

#### Access Community Builder Directly from Setup

For communities created with a Community Builder-based template, you can now access Community Builder directly from the All Communities page in Setup. Fewer clicks to get you where you want to go is always a good thing.

### Add Markup to the Page <head> to Customize Your Community

Interested in adding custom analytics to your community's pages? Or how about including tags to improve your SEO results? With access to the page <head>, now you can!

### Improved Error Handling for Lightning Components

Community Builder gracefully handles issues, such as malformed URLs or invalid component properties, by displaying an appropriate error message.

### Enhanced Page Loading Experience

We've improved the page loading experience for your community users by displaying a ghost version of your community page until the page loads completely. Previously, community users saw a blank page while waiting for the community page to load.

### Hide or Customize the Default Koa and Kokua Header

Use your own branding and custom components in the Koa and Kokua templates. Hide the default header and use the customizable regions above and below the header to add your own components.

#### jQuery No Longer Automatically Included for Custom Lightning Components

We no longer automatically include the jQuery JavaScript library for custom Lightning components used in Community Builder. As a result, if your custom Lightning components depend on jQuery, you must manually include a link to an open-source jQuery library in the <head> markup of your community.

# Manage Pages More Easily with the Enhanced Page Manager

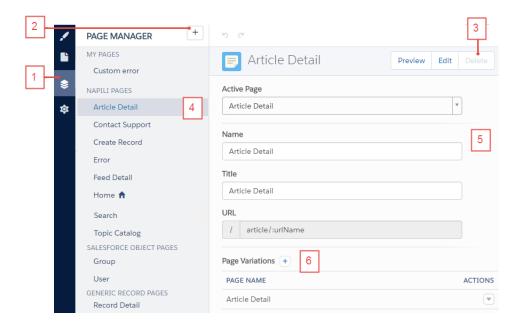
Page management in Community Builder just got a whole lot easier! Not only can you select the active pages for your community, now you can create and delete pages, add page variations, and access page properties.



Note: For communities using the Winter '16 version of the Koa, Kokua, and Napili templates, this functionality is available immediately after the Spring '16 release. In all other cases, you must update your template to Spring '16 to use this functionality.

We've centralized all your page-related needs by:

- Moving page management from the Settings area to the new Page Manager area (1)
- Relocating page creation (2) and page deletion (3) from the Page Editor
- Grouping pages by type (4) so that you can easily select a page to see its properties (5)
- Relocating editable page properties from the Property Editor tab in the Page Editor (5)
- Including an editable Page Description property (where applicable) for SEO purposes
- Adding a Base URL property for custom object pages to let you simultaneously change the URLs for all pages—record detail, list, and related list—associated with an object
- Moving the option to create and manage alternative page variations (6)



# Make the Most of Your Data with Improved Page Creation

As part of the Page Manager enhancements, we've improved the way you create custom pages for your communities. And in the Napili template, you can now create custom record list and related list pages to get the most from your Salesforce data.

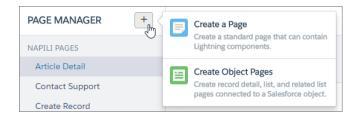


**Note:** For communities using the Winter '16 versions of the Napili, Koa, and Kokua templates, these changes are available immediately after the Spring '16 release. In all other cases, you must update your template to Spring '16. Only Napili supports creation of custom object pages.

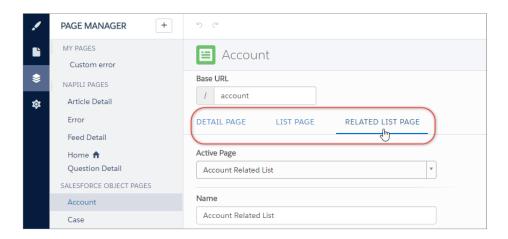
First things first. If you're wondering where the **New Page** button went, wander over to the new Page Manager and check out the updated + button. Page Manager is the new location for all things page-related, including page creation.

Now to the heart of the improvements! Let's look at some of the other changes you'll notice when creating custom pages.

- When you click +:
  - You can still create a blank standard page from a layout or one of the template's pages, but we've added shiny new layouts to
    make page creation even easier.
  - In the Napili template, you can now create all the pages—record detail, list, and related list—associated with one of your Salesforce objects.



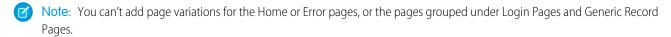
• Whereas you previously added the name when you created the record detail page in the Napili template, now you can update the name after you create the pages. To access the properties of each page associated with an object, select the object under Salesforce Object Pages and click the tab you need.



- You can update the base URL of custom object pages in Napili, which ensures that all object pages share a common URL prefix. However, you can't update the individual URL for an object page.
- You can also create pages in the Page Variations section.

## **Page Variations**

The Page Variations section lets you quickly create additional versions of the selected page. For example, you could create three different Question Detail pages to test out various layouts or styles. Unlike general page creation, new pages are automatically based on the appropriate default template page—in this case, Napili's Question Detail page—and you can choose from several different layouts.



To create a page variation, click 🛨 . To preview, edit, or delete a page, click 💌 .



# Change Things Up with New and Custom Layouts

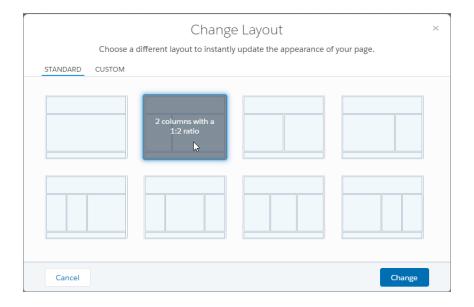
We've added some new layouts to make it easier to quickly change the look of your community's pages. You can even create your own custom layouts in the Developer Console and import them to use in your community!

Note: For communities using the Winter '16 version of the Koa, Kokua, and Napili templates, this functionality is available immediately after the Spring '16 release. In all other cases, you must update your template to Spring '16 to use this functionality.

To change the layout of a page in Page Editor, click **Change Layout** in the Property Editor.



In the Change Layout dialog box, you can choose from several new layouts. And if you've added a custom layout, you can access it in the Custom tab.



1 Tip: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

For more information on custom layouts, see the Lightning Components Developer's Guide.

# Access Community Builder Directly from Setup

For communities created with a Community Builder-based template, you can now access Community Builder directly from the All Communities page in Setup. Fewer clicks to get you where you want to go is always a good thing.



# Add Markup to the Page <head> to Customize Your Community

Interested in adding custom analytics to your community's pages? Or how about including tags to improve your SEO results? With access to the page <head>, now you can!

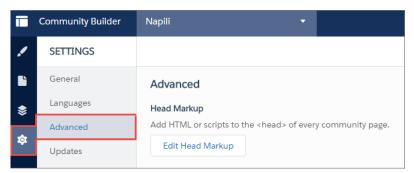


**Note**: For communities using the Winter '16 version of the Koa, Kokua, and Napili templates, this functionality is available immediately after the Spring '16 release. In all other cases, you must update your template to Spring '16 to use this functionality.

For example, you can customize your community's pages to suit your needs by adding:

- Custom analytics code, such as Google Analytics<sup>™</sup>
- SEO meta tags that are visible only to search engines
- References to external JavaScript files and third-party libraries
- Custom JavaScript blocks
- A favicon or web page icon

To access the page <head>, go to the Advanced section of the Settings area in Community Builder and click **Edit Head Markup**.



When you add custom markup, the code is added to the <head> of every page.

**(1)** 

**Example**: Here we've added HTML to include a favicon on our community's pages.

# Improved Error Handling for Lightning Components

Community Builder gracefully handles issues, such as malformed URLs or invalid component properties, by displaying an appropriate error message.



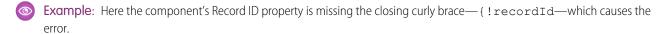
Note: For communities using the Winter '16 version of the Koa, Kokua, and Napili templates, this functionality is available immediately after the Spring '16 release. In all other cases, you must update your template to Spring '16 to use this functionality.

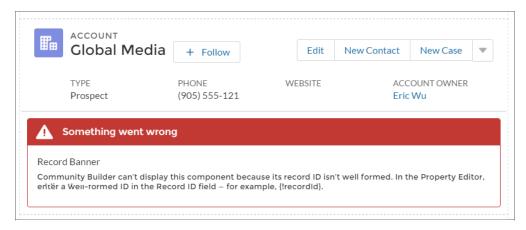
When a problem is detected with the parameters of a URL:

- The page isn't loaded. The default error page is displayed instead.
- The response is flagged as a 404 error for SEO purposes.

When a problem is detected with the properties of a component:

- A warning message replaces the component in Community Builder to indicate what went wrong.
- The component is hidden from view in the published community or when previewed in a separate tab.





# **Enhanced Page Loading Experience**

We've improved the page loading experience for your community users by displaying a ghost version of your community page until the page loads completely. Previously, community users saw a blank page while waiting for the community page to load.

**Show loading indicator as the page loads** is enabled by default in the Settings area of the Community Builder. However, if your page header is highly customized and the ghost version varies vastly from the real version loading in the browser, you can disable this feature.





## Hide or Customize the Default Koa and Kokua Header

Use your own branding and custom components in the Koa and Kokua templates. Hide the default header and use the customizable regions above and below the header to add your own components.



Note: You must update your community's template to the Spring '16 version to use this functionality.

In Community Builder, click on the left, click **General**, and then select **Hide header region and navigation**. Choosing this option hides the default header image, the search box, the community menu, and user profile navigation menu on all the pages in your community.



Tip: If you choose to hide the header, consider replacing some of the hidden functionality with custom components. For example, you can create a custom navigation menu to replace the default community navigation. Or, add a language picker to the editable header regions above and below the default header.

# ¡Query No Longer Automatically Included for Custom Lightning Components

We no longer automatically include the jQuery JavaScript library for custom Lightning components used in Community Builder. As a result, if your custom Lightning components depend on jQuery, you must manually include a link to an open-source jQuery library in the <head> markup of your community.

To include a link to a hosted library, such as the Google Hosted Libraries:

- 1. In Community Builder, go to the Advanced section in the Settings area.
- 2. Click Edit Head Markup.
- 3. Copy and paste a HTML snippet for the hosted jQuery library. For example:

```
<script src="https://ajax.googleapis.com/ajax/libs/jquery/2.2.2/jquery.min.js"></script>
```

- 4. Click Save.
- 5. Click **Publish** to publish your changes to the community.

# Community Setup

Communities Setup is now available in Lightning Experience! You also get limit increases, a streamlined setup for two-factor authentication, the ability to use Platform Encryption in your community, and much more.

#### IN THIS SECTION:

### Communities Setup is Now Available in Lightning Experience

You can now enable and change settings for Communities in the Setup menu in Lightning Experience. The full Salesforce Communities product is not supported in Lightning Experience, so to create, manage, or use your communities, you must use Salesforce Classic.

#### Maximum Number of Communities Is Now 50

Great news! We increased the maximum number of communities you can have in your Salesforce org to 50. No questions asked. Previously, this limit was org-specific.

### Streamlined Setup of Two-Factor Authentication for Communities

We've simplified the process of setting up two-factor authentication at login. You can now use profile policies and session settings to require community members to complete two-factor authentication when they log in. Previously, you had to create a custom login flow.

#### Let Users See Encrypted Data

If your community uses Platform Encryption, you can now give community user profiles the "View Encrypted Data" permission so they can see encrypted data as plaintext.

# Communities Setup is Now Available in Lightning Experience

You can now enable and change settings for Communities in the Setup menu in Lightning Experience. The full Salesforce Communities product is not supported in Lightning Experience, so to create, manage, or use your communities, you must use Salesforce Classic.

To enable or change settings for Communities in Lightning Experience, in Setup search for Communities. To enable or view settings for Communities, click Communities Settings. To view a list of communities or start creating a new one, click All Communities.



**Note**: When you start creating a community, choose to manage an existing community, or view a community, you move out of Lightning Experience and into Salesforce Classic.

The global header for communities is only available in Salesforce Classic. If you enable Lightning Experience, users who have the Communities global header turned on and who have permission to access Lightning Experience can easily change between Salesforce Classic and the new interface using the Switcher. Look for the Switch to Lightning Experience link in the Your Name menu.

### Global header with option to switch to Lightning Experience:



Users who are using communities, but don't have the global header turned on, can easily switch to Lightning Experience using the standard *Your Name* menu.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

## Maximum Number of Communities Is Now 50

Great news! We increased the maximum number of communities you can have in your Salesforce org to 50. No questions asked. Previously, this limit was org-specific.

Active, inactive, and preview communities, including Force.com sites, count against this limit.

All orgs can see the new limit once they upgrade to the Spring '16 release. To see this limit in your org, from Setup enter *Communities* in the Quick Find box, then select **All Communities**. The Maximum number of communities field displays 50.

# Streamlined Setup of Two-Factor Authentication for Communities

We've simplified the process of setting up two-factor authentication at login. You can now use profile policies and session settings to require community members to complete two-factor authentication when they log in. Previously, you had to create a custom login flow.

All Salesforce user interface authentication methods, including username and password, delegated authentication, SAML single sign-on, and social sign-on through a third-party authentication provider, are supported.

To require two-factor authentication for community members assigned to a particular profile, first use the Session security level required at login profile setting. Then set session security levels in your org's session settings to apply the policy for particular login methods.

By default, the session security requirement at login for all profiles is None. You can edit a profile's Session Settings to change the requirement to High Assurance. When profile users with this requirement log in with a login method (such as username and password) that grants standard level security instead of high assurance, they're prompted to verify their identity with two-factor authentication. After community members authenticate successfully, they're logged in to the community.

You can edit the security level assigned to a login method in your org's Session Settings.

Your community members with mobile devices can use the Salesforce Authenticator mobile app or another authenticator app for two-factor authentication. If you set the High Assurance requirement on a profile, a profile user who doesn't already have Salesforce Authenticator or another authenticator app connected to their account is prompted to connect the app before they can log in. After they connect the app, they're prompted to use the app to verify their identity.



Example: You've configured Facebook and Linkedln as authentication providers in your community. Many of your community members use "social sign-on" to log in using the username and password for their Facebook or Linkedln accounts. You want to increase security by requiring users with the Customer Community User profile to use two-factor authentication when they log in with their Facebook account, but not with their Linkedln account. You edit the Customer Community User profile and set the Session security level required at login to High Assurance. In your org's Session Settings, you edit the Session Security Levels. You place Facebook in the Standard column. In the High Assurance column, you place Two-Factor Authentication. You also place Linkedln in the High Assurance column.



**Note**: You can also use login flows to change the user's session security level to initiate identity verification under specific conditions. Login flows let you build a custom post-authentication process that meets your business requirements.

#### SEE ALSO:

Salesforce Help: Set Two-Factor Authentication Login Requirements for Single Sign-On, Social Sign-On, and Communities Salesforce Help: Two-Factor Authentication

# Let Users See Encrypted Data

If your community uses Platform Encryption, you can now give community user profiles the "View Encrypted Data" permission so they can see encrypted data as plaintext.

Administrators can encrypt all the standard and custom fields that are available for encryption, as well as files and attachments.

If you are using Classic Encryption, data in encrypted custom fields is still masked.

When you share personally identifiable information (PII) within a community, the community's specific settings still apply.

You still can't assign the "View Encrypted Data" permission to guest users.



**Note**: If your organization includes an active portal, you can't encrypt any standard fields.

#### SEE ALSO:

Salesforce Help: Platform Encryption

# **Community Management**

Managing your community is now even easier than before. You can set up community file limits and now community moderation supports all feed types, special characters in your keyword lists, the API, and much more. To give you more control and flexibility with your community recommendations, you can now specify where your recommendations appear and target specific audiences.

To access Community Management, you need the "Manage Communities" or "Create and Set Up Communities" permission. You must also be a member of the community whose Community Management page you're trying to access.

#### IN THIS SECTION:

#### Limit the Size and Types of Files Allowed in Your Community

We're giving you more control over the files in your community because we share the same enemy—spammers. You can now restrict the size and types of files that community members can upload. This whitelist of files lets you prevent spammers and your community members from polluting your community with inappropriate files.

#### **Increased Community Moderation Limits**

You can now have up to 30 keyword criteria lists and 30 moderation rules in your community. Previously, you could have 10 keyword criteria lists and 10 moderation rules.

### Extended Moderation Support for All Feed Types

We don't want anything inappropriate sneaking into your community. That's why we've extended community moderation to support all feed types. When your community members create a post, your moderation rules now apply to all feed types, such as polls, links, and file names. Nothing is getting by us!

#### Display Blocked Keywords in Your User Messages for Moderation Rules

Keep your community members informed. When their content is blocked by a moderation rule, you can now tell them which words were blocked.

#### Translate Your User Messages for Moderation Rules

We're making it easier for you to communicate with your international community members. You can now translate your user messages for moderation rules that block content.

#### **Keyword Lists Now Support Special Characters and Spaces**

You can now moderate even more keywords in your community. Keywords can now include spaces and special characters, like hyphens (-). Previously, keywords could only include letters, numbers, and ampersands (&).

#### Use the API to Set Up Moderation Rules

You can now set up your community moderation rules using the Metadata API or Tooling API.

### Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

#### Control Where Your Recommendations Appear

Use channels to group custom recommendations together and control where they appear in your community.

# Limit the Size and Types of Files Allowed in Your Community

We're giving you more control over the files in your community because we share the same enemy—spammers. You can now restrict the size and types of files that community members can upload. This whitelist of files lets you prevent spammers and your community members from polluting your community with inappropriate files.

Community file moderation must be enabled for your org before you can limit files in your community. If you don't see the option to limit files in Community Management, contact Salesforce.

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from Salesforce 1. You can also set community file limits using the SOAP API or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify. Keep the following things in mind:

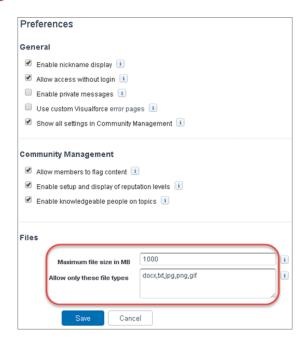
- A file must meet the file limits set in the community in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer community still apply.
- Files uploaded in your internal Salesforce org that are shared in a community aren't subject to community file limits.
- 1. Access Community Management in either of the following ways.
  - From the community, click in the global header.
  - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
- **2.** Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.
  - Maximum file size in MB—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter 0.
  - Allow only these file types—Enter file extensions separated with a comma (for example: jpg, docx, txt). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.

#### 3. Click Save.

After you set your community's file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

# Example:



## **Increased Community Moderation Limits**

You can now have up to 30 keyword criteria lists and 30 moderation rules in your community. Previously, you could have 10 keyword criteria lists and 10 moderation rules.

SEE ALSO:

Salesforce Help: Communities Moderation Limits

# **Extended Moderation Support for All Feed Types**

We don't want anything inappropriate sneaking into your community. That's why we've extended community moderation to support all feed types. When your community members create a post, your moderation rules now apply to all feed types, such as polls, links, and file names. Nothing is getting by us!

If you already have moderation rules in your community, those rules now apply to all feed types. No need to update your moderation rules because you get the extended support automatically.

SEE ALSO:

Salesforce Help: Create Moderation Rules for Your Community

# Display Blocked Keywords in Your User Messages for Moderation Rules

Keep your community members informed. When their content is blocked by a moderation rule, you can now tell them which words were blocked.

To display up to five of the blocked keywords in the user message, include the <code>%BLOCKED\_KEYWORD%</code> variable in the message. If you don't provide a custom message, this variable is included in the message by default.



**Example**: Default message community members receive if their content is blocked.



SEE ALSO:

Salesforce Help: Create Moderation Rules for Your Community

# Translate Your User Messages for Moderation Rules

We're making it easier for you to communicate with your international community members. You can now translate your user messages for moderation rules that block content.

To translate the user message, from Setup, enter *Translate* in the Quick Find box, then select **Translate**. Select the **Moderation Rule** setup component and expand the community the rule belongs to, then provide the message translation.

SEE ALSO:

Salesforce Help: Entering Translated Terms
Salesforce Help: Create Moderation Rules for Your Community

# Keyword Lists Now Support Special Characters and Spaces

You can now moderate even more keywords in your community. Keywords can now include spaces and special characters, like hyphens (-). Previously, keywords could only include letters, numbers, and ampersands (&).



**Example**: You can use special characters and spaces to cover different variations of the same word.

bad-word

badword

b@dword

SEE ALSO:

Salesforce Help: Create Moderation Criteria for Your Community

# Use the API to Set Up Moderation Rules

You can now set up your community moderation rules using the Metadata API or Tooling API.

For more information, see KeywordList and ModerationRule in Metadata API - New Types and Tooling API - New Objects.

# Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

- 1. Access Community Management in either of the following ways.
  - From the community, click in the global header.
  - From Setup, enter All Communities in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
- 2. Select Recommendations > Audiences.
- 3. Click New.
- **4.** Complete the following fields.
  - Name—Enter a name for the audience in Community Management.
  - Audience Type
    - Select New Members to create an audience based on how long users have been community members.
       Enter the number of days since registration for audience members.
    - Select **Custom List** to create an audience based on any criteria you want.



Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.

#### 5. Click Save.

Audiences you create appear in the Audience drop-down list when you create a recommendation.



Tip: To remove an audience, in Community Management, select Recommendations > Audiences, and click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All community members).

### Control Where Your Recommendations Appear

Use channels to group custom recommendations together and control where they appear in your community.

In Community Management, select **Recommendations** > **Recommendations**. Existing recommendations are in the Default Channel. Before you create a recommendation, choose Default Channel or one of the custom channels.

A channel is a way to group recommendations together so you can determine where they show up in the community.

### **Default Channel**

Recommendations in the default channel appear in predefined locations, such as directly in the feed in the Salesforce1 mobile browser app and on the Home and Question Detail pages in communities using the Summer '15 or later version of the Napili template.

#### **Custom Channel**

You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations component to the page where you want the recommendation to appear. Use the Property Editor to specify the custom channel with the recommendation.

Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

You can also assign audiences to your recommendations by choosing the audience name from the Audience drop-down list. If you haven't created an audience or don't select an audience, all members of the community get the recommendation by default.

Recommendation channels are supported in Chatter REST API and Chatter in Apex.

# Community Reports and Dashboards

Start the drum roll ladies and gents! You can now grant all your role-based external users permission to create and edit reports! You also get new custom report types and you can share Wave dashboards.

#### IN THIS SECTION:

### Report Management for All Role-Based External Users

We love reports. You love reports. And now your role-based external users can love reports too! All role-based external users in your community can create and edit reports in their own personal folder or in a privately shared folder, if they have sufficient permissions. Previously, only role-based external users with super user access could create and edit reports.

#### Increased Dashboard Refresh Limit for Role-Based External Users

All role-based external users in your community can now refresh dashboards up to 1,000 times daily per org. The dashboards must be set up with "Run as specified user" or "Run as logged-in user." Previously, only external users with super-user access could refresh dashboards, and the limit was 100 per day.

### New Custom Report Types and Fields for Moderation, Recommendations, and User Profile

You can now create reports that track flagged content, user profiles with or without photos, and custom recommendation usage in your community.

### Share Wave Analytics with Your Community (Generally Available)

Increase productivity and spark data-driven conversations with embedded and personalized dashboards for community members. With Wave Analytics for Communities, your partner and customer users can view and explore Wave dashboards embedded in Visualforce pages in your community.

### Report Management for All Role-Based External Users

We love reports. You love reports. And now your role-based external users can love reports too! All role-based external users in your community can create and edit reports in their own personal folder or in a privately shared folder, if they have sufficient permissions. Previously, only role-based external users with super user access could create and edit reports.

Role-based external users are users with licenses such as Customer Community Plus and Partner Community. Legacy role-based portal licenses such as Customer Portal and Gold Partner are also included. You can grant your role-based external users permission to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

To allow your role-based external users to create and edit reports, turn on the "Create and Customize Reports," "Report Builder," and "Edit My Reports" permissions.

#### SEE ALSO:

Salesforce Help: Communities Report and Dashboard Limitations

Salesforce Help: Set Up Report Management for External Users—Create and Edit Reports

### Increased Dashboard Refresh Limit for Role-Based External Users

All role-based external users in your community can now refresh dashboards up to 1,000 times daily per org. The dashboards must be set up with "Run as specified user" or "Run as logged-in user." Previously, only external users with super-user access could refresh dashboards, and the limit was 100 per day.

Remember, internal users have no refresh limit, and scheduled and automatic refreshes don't count against the limit.

# New Custom Report Types and Fields for Moderation, Recommendations, and User Profile

You can now create reports that track flagged content, user profiles with or without photos, and custom recommendation usage in your community.

Create a custom report type using the following objects, and then create your report.

- Networks > Network Members (use the Has Profile Photo field on Network Members)
- Networks > Network Moderations
- Networks > Recommendation Metric

#### SEE ALSO:

Salesforce Help: Track Community Activity

### Share Wave Analytics with Your Community (Generally Available)

Increase productivity and spark data-driven conversations with embedded and personalized dashboards for community members. With Wave Analytics for Communities, your partner and customer users can view and explore Wave dashboards embedded in Visualforce pages in your community.

In the Wave Analytics Settings for your org, select Enable Wave Analytics for Communities. Your partner and customer users can view embedded Wave dashboards if they have the Analytics Cloud - Wave Community Users permission set license and a permission set that includes the "View Wave Analytics on Communities Pages" permission.

Access is given by selecting **Share** from a Wave app or dashboard. Community partner and customer users are granted read-only access to Wave Analytics. From your community, they can drill in and

explore embedded dashboards, but all other areas of Wave Analytics remain inaccessible. Security predicates can give you additional control over the visibility of your data.



**Note:** Only users with a Customer Community Plus or Partner Community license can use this feature. This feature is supported in communities but not in portals.

For more information about embedding Wave Analytics, see Add a Wave Analytics Dashboard to a Visualforce Page.

### Community Insights and Analytics

When you install the updated Salesforce Communities Management package from the AppExchange, you're in store for quite a magic trick. Community Management dashboards now display as Lightning dashboards—even if your org isn't using Lightning Experience. To top it off, you also get new and improved Insights reports.

### IN THIS SECTION:

### Lightning Dashboards in Community Management

We can't pull any rabbits out of a hat, but we can make Lightning dashboards appear in Community Management! All dashboards in Community Management now display as Lightning dashboards, even if the dashboard is a Salesforce Classic dashboard or if your org is using Salesforce Classic. We call this makeover magic! So get ready to have a new look and feel to your Community Management home page and mapped dashboard pages.

### New and Improved Insights and Dashboard for Community Management

Meet the new and improved Insights! You can now filter your Insights reports in Community Management by relative and custom date ranges and sort columns by ascending and descending order. You can also get new Insights reports to track user profile photos and a dashboard to help you track custom recommendations.

### Lightning Dashboards in Community Management

We can't pull any rabbits out of a hat, but we can make Lightning dashboards appear in Community Management! All dashboards in Community Management now display as Lightning dashboards, even if the dashboard is a Salesforce Classic dashboard or if your org is using Salesforce Classic. We call this makeover magic! So get ready to have a new look and feel to your Community Management home page and mapped dashboard pages.



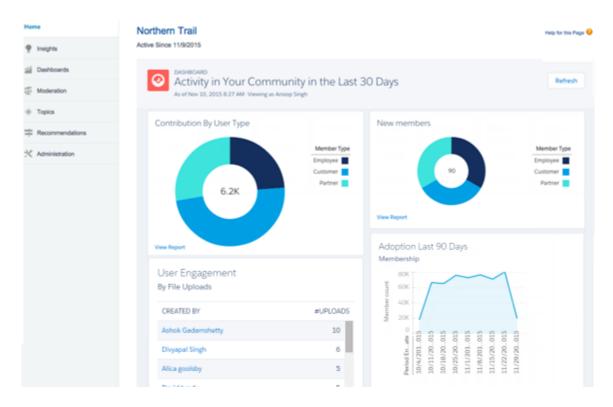
Tip: Install the Spring '16 version of the Salesforce Communities Management package to get preconfigured Lightning-Optimized dashboards for Community Management. This package will be available for download on the AppExchange shortly after the Spring '16 release. This package works in the following communities: Salesforce Tabs + Visualforce, Koa, Kokua, and Napili.

# EDITIONS

Wave Analytics is available in: **Developer** Edition

Wave Analytics is available for an extra cost in:

**Enterprise**, **Performance**, and **Unlimited** Editions



### How does all this magic work?

We've changed the default display for all dashboards in Community Management from Salesforce Classic to Lightning Experience. All dashboards in Community Management display as Lightning dashboards regardless of what type of dashboard you're using or what interface your org is using. Remember that the Communities product is not supported in Lightning Experience. We're just giving your dashboards a makeover by leveraging a Lightning display.

The AppExchange package provides preconfigured Salesforce Classic dashboards that are optimized for this Lightning display. To keep things short and simple, we call these dashboards Lightning-Optimized dashboards. Here's a breakdown of the different types of dashboards and what the AppExchange package delivers.

- Salesforce Classic dashboards—created in your Salesforce Classic org
- Lightning Experience dashboards—created in your Lightning Experience org (not delivered in the AppExchange package)
- Lightning-Optimized dashboards—created in your Salesforce Classic org, but configured to optimally render in a Lightning display (delivered in the AppExchange package)

All dashboard types are supported in Community Management, we just recommend using the Lightning-Optimized dashboards provided in the AppExchange package.

### What happens when I install the package?

During package installation, dashboard folders are installed in your org and one of two things happens.

- If you already have dashboards mapped, you must manually update your dashboard mappings to use the new Lightning-Optimized dashboards.
- If this is your first time installing the package or you don't have dashboards mapped in Community Management, the Lightning-Optimized dashboards are automatically mapped for you.

### Do I have to do anything?

Yes. After you install the package, verify that your dashboard mappings are using the new Lightning-Optimized dashboards. In Community Management, go to the **Dashboards** > **Settings** page and check that the mapped dashboards are from the Lightning Communities Dashboards folder.

Remember, not all browsers support Lightning dashboards. Review the supported browsers and make sure you're ready.

#### Can I customize these dashboards?

Of course you can! In your Salesforce org, click the **Dashboards** tab and then select the dashboard from the list. Make sure you review the limitations and considerations below.

#### Are there limitations or considerations?

For a Salesforce Classic dashboard to work as a Lightning-Optimized dashboard, it must meet the following requirements:

- Include up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge
   For a list of dashboard features not available in Lightning Experience, see Reports and Dashboards: Lightning Experience Limitations in the Salesforce help.

If you want to continue using the Salesforce Classic dashboards that were previously mapped in Community Management, know that some dashboard design features won't optimally render in the Lightning display. For example, metric reports display as large tiles. It's recommended that you edit these dashboards to provide a better user experience for your community managers. You might want to remove the metric reports from the dashboards.

Considerations for orgs using Lightning Experience:

- Keep in mind that after saving a dashboard in Lightning Experience, you can't edit it in Salesforce Classic. For this reason, we recommend that you re-create the Lightning-Optimized dashboards in Lightning Experience.
- You can use the Lightning-Optimized dashboards provided in the package, but know that more power is at your fingertips.
   Because your org is using Lightning Experience, you can re-create the Lightning-Optimized dashboards in your org to take full advantage of the Lightning Experience capabilities. You don't need to use optimized dashboards when you can have the real deal. Keep in mind that the Communities product is not supported in Lightning Experience.

Considerations for orgs using Salesforce Classic:

If you are an advanced user and you don't want to use the Lightning-Optimized dashboards but want the real thing instead, use this workaround. First, create the Lightning Experience dashboards in a Developer Edition org with Lightning Experience enabled. Then deploy them as an unmanaged package or configure them using the Dashboard settings node. To update these dashboards, redeploy the package with your updates.

### SEE ALSO:

Salesforce Help: Report on Communities with the Dashboards and Insights Package Salesforce Help: Enable and Map Dashboards for Community Managers

### New and Improved Insights and Dashboard for Community Management

Meet the new and improved Insights! You can now filter your Insights reports in Community Management by relative and custom date ranges and sort columns by ascending and descending order. You can also get new Insights reports to track user profile photos and a dashboard to help you track custom recommendations.

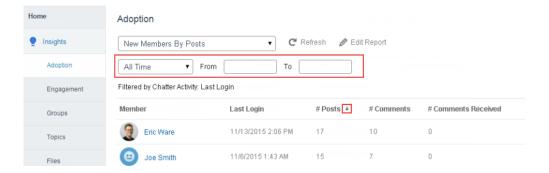


Tip: The Salesforce Communities Management package will be available for download on the AppExchange shortly after the Spring '16 release.

#### **Filter and Sort Your Insights Reports**

You can use predefined relative date filters such as All Time and This Week, or select **Custom** to specify your own date range.

When sorting the report by a column, an arrow indicates whether the report is sorted by ascending or descending order.

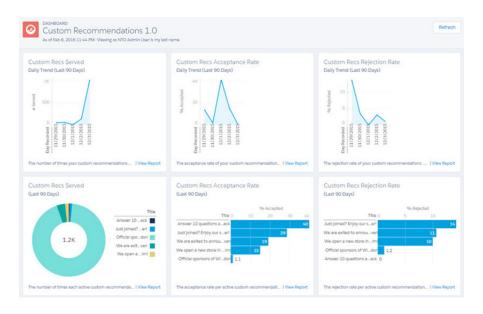


### **Insights for User Profiles Photos**

In the Spring '16 version of the package, you can get preconfigured Insights reports that help you track whether your members have user profile photos. You can also track posts or comments from members without a profile picture.

### **Dashboard and Reports for Custom Recommendations**

In the Spring '16 version of the package, you can get a preconfigured dashboard and associated reports to help you see how your community's custom recommendations are doing. You can tell how often your recommendations are viewed, clicked, or dismissed. You can also view data for individual recommendations or across channels.



### SEE ALSO:

Salesforce Help: View and Customize Insights in Community Managements
Salesforce Help: Report on Communities with the Dashboards and Insights Package

# Other Changes in Communities

Other important changes to Communities include a limit increase, access to Notes and Attachments for users with a Customer Community license, more robust field-level security for guest users, and changes to how emails are sent for large community groups.

#### IN THIS SECTION:

#### Edit Posts Containing Files or Links

So you wrote an awesome community post and attached an even more awesome picture, but then you forgot to @mention the right people. Previously, you had to use comments to make any updates to posts that contained files or links. Now you can simply edit the original post. Sweet!

#### Increased User Limit for Customer Communities

Hooray for fast-growing communities! You can now have up to 10 million users in a customer community. Previously, this limit was 7 million users.

#### Customer Community Licenses Can Access Notes and Attachments on Accounts and Contacts

Users with a Customer Community license can now access Notes and Attachments on accounts and contacts using the note-taking tool. Previously, this access was blocked. Don't worry about your users with a Customer Community license seeing data they're not supposed to—you can specify whether Notes and Attachments are public or private.

#### Get Emails on Every Post in Large Community Groups

Previously in communities, Email on every post was disabled for groups with more than 10,000 members. Now Email on every post isn't disabled until more than 10,000 group members choose this setting for the group.

### Do More with Accounts, Cases, Contacts, and Documents in Employee Communities

The Company Community user license now provides read, create, edit, and delete access to accounts, cases, contacts, and documents, and more.

### Robust Field-level Security for Guest Users

In the past quest users were able to enter data into read-only fields because field-level security was not enforced.

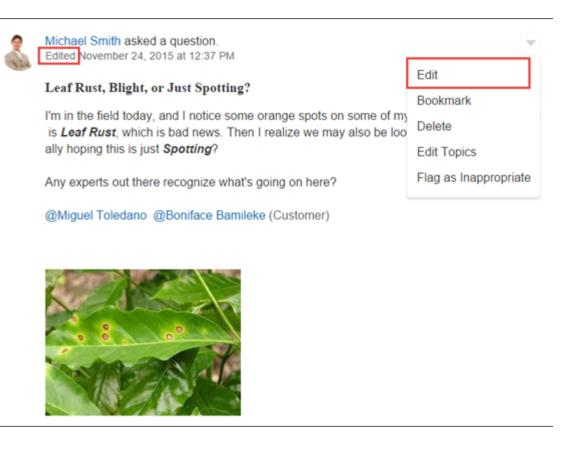
### **Edit Posts Containing Files or Links**

So you wrote an awesome community post and attached an even more awesome picture, but then you forgot to @mention the right people. Previously, you had to use comments to make any updates to posts that contained files or links. Now you can simply edit the original post. Sweet!

This feature is available in communities created using the Napili template.



**Example**: Edit a post containing an attached file.



### Increased User Limit for Customer Communities

Hooray for fast-growing communities! You can now have up to 10 million users in a customer community. Previously, this limit was 7 million users.

If your community needs more than 10 million users, contact Salesforce.

# Customer Community Licenses Can Access Notes and Attachments on Accounts and Contacts

Users with a Customer Community license can now access Notes and Attachments on accounts and contacts using the note-taking tool. Previously, this access was blocked. Don't worry about your users with a Customer Community license seeing data they're not supposed to—you can specify whether Notes and Attachments are public or private.



Note: To turn on this access, contact Salesforce.

Orgs created after the Spring '16 release get this access by default. When access is enabled, users can access Notes and Attachments in communities and in the API, but not in the UI for portals. Access to the new Notes feature isn't included.

SEE ALSO:

Salesforce Help: What's the Difference Between Notes and the Old Note-Taking Tool?

### Get Emails on Every Post in Large Community Groups

Previously in communities, Email on every post was disabled for groups with more than 10,000 members. Now Email on every post isn't disabled until more than 10,000 group members choose this setting for the group.

In large community groups where Email on every post was previously disabled, members with this setting were automatically switched to Daily digests. If group members want to receive emails on every post in a large group, direct them to the **Email**Me... drop-down on the group's page.

### Do More with Accounts, Cases, Contacts, and Documents in Employee Communities

The Company Community user license now provides read, create, edit, and delete access to accounts, cases, contacts, and documents, and more.

**①** 

**Important:** The Company Community user license and Company Community Force.com permission set license are being updated beginning March 23, 2016 to provide even more access. See below for details.

Previously, users with an Employee Community license only had read access to accounts and contacts, and create and read access to cases and documents. Spring '16 brings the ability to read, create, edit, and delete all these objects. Expanding the available actions for these commonly used objects in employee communities means:

- Employees can do more with their own cases
- Managers can move their out-of-office direct reports' cases along
- Employees can create, read, and comment on each other's cases

More access means tickets move faster through the queue, reduced load for service centers, and easier collaboration. Want to customize access for different types of users? Now you can!

#### **Customize Access in User Profiles**

When managing user profiles, customize access to objects in the **Standard Object Permissions** section. Read, create, edit, and delete actions are now enabled by default for accounts, cases, contacts, and documents.



#### **Customize Tab Settings in User Profiles**

The **Accounts**, **Cases**, **Contacts**, and **Documents** tabs are hidden by default. To make the tabs available to users, set them to Default On or Default Off. Default On means that the tabs are visible for users. Default Off means users can access the tabs in **All Tabs** and can add them to their tab set.



### Updates Beginning March 23, 2016



**Note:** The Company Community user license and Company Community Force.com permission set license are being updated beginning March 23, 2016.

### Additional Permissions in the Company Community User License

After March 23, 2016 users with a Company Community user license have expanded permissions within your employee community, including access to assets, push topics, and work orders. Users can enable or disable the new Lightning Experience user interface, along with expanded site administration and reporting permissions.

[] Important: All new and existing orgs with this license are impacted by this change. Updates to the object permissions are immediately visible to employee community users who have standard profiles associated with Company Community user licenses. To control and limit access to these permissions, create custom profiles and enable or disable access to these permissions as required.

The following permissions are automatically enabled for users with standard profiles:

**Table 1: Standard Object Permissions** 

	· · · · · · · · · · · · · · · · · · ·							
	Create	Read	Edit	Delete	View All	Modify All		
Accounts	~	~	~	~	*	*		
Assets	<b>✓</b>	~	~	~				
Cases	<b>✓</b>	~	~	~				
Contacts	~	~	~	~	*	*		
Documents	~	~	~	~	*	*		
Push Topics	~	~	~	~				
Work Orders	~	~	~	~				

<sup>\*</sup> View All Data and Modify All Data permissions, where available, must be enabled by the administrator, even on standard profiles. The following user permissions are available to users with Company Community licenses and are disabled by default. Admins must enable these permissions for users to see them.

**Table 2: Available User Permissions** 

User Permission	Description			
Lightning Experience User	Access the Salesforce Lightning Experience. Users with this permission can individually enable or disable this user interface.  Note: This user permission is enabled by default.			
Edit My Reports	Edit, move, save, and delete user's own reports in shared folders.			
View Public Reports	View and access reports in public folders, which does not include others' personal folders.			
Edit Public Reports	Create, edit, and delete public reports.			
Create Report Folders	Create report folders and manage these folders if sharing rights allow.			
Manage Reports in Public Folders	Create, edit, delete reports, and manage their sharing in all public folders.			
View My Team's Dashboards	View dashboards owned by people under them in the role hierarchy.			
Edit Public Documents	Create, edit, and delete folders for public documents.			
Edit Public List Views	Create, edit, and delete public list views.			
Use Identity Features	Gives the user access to Identity features such as App Launcher.			
Import Custom Objects	Allows non-admin users to import Custom Objects using Data Import Wizard.			
Import Personal Contacts	Import personal accounts and contacts.			

### Additional Permissions in the Company Community Permission Set License

The Company Community for Force.com permission set license has been extensively updated to provide most of the permissions provided by the Company Community user license, including read, create, edit, and delete access to accounts, contacts, cases, and documents. This allows organizations to assign the Company Community permission set license to users with the Salesforce Platform or Force.com App Subscription license, increasing employee collaboration and productivity in your employee community.

All new and existing orgs with this license are impacted by this change. In order for users to see changes, admins must enable permissions in the permission set and assign the permission set to users.

### Robust Field-level Security for Guest Users

In the past guest users were able to enter data into read-only fields because field-level security was not enforced.

With the Spring '16, you must set field-level security if you use your guest user license for case creation..

# Chatter: Broadcast Groups, Banner Photos, Edit More Posts

Create broadcast groups, enjoy banner photos for users and groups, and edit posts with files and links. There are more improvements for groups, user profiles, feeds, and personal digest emails.

#### IN THIS SECTION:

#### Groups

Create broadcast groups, add groups to communities, and review group member activity in the new group engagement report. Groups in Lightning Experience now support custom banner images and customer groups.

#### **User Profiles**

Upload a banner photo on your profile, see everyone's photo on the People page, and use a circular cropping tool when editing your photo.

#### Feeds

Edit posts with files and links, see more relevant suggestions when mentioning people, and refresh the feed easily in Lightning Experience.

### **Digest Emails**

Get the redesigned, reorganized, mobile friendly personal digest.

### Chatter Messenger: Retiring in Spring '17

It's sad but true: Chatter Messenger is retiring in Spring '17. After many years of faithfully relaying instant messages between coworkers, Chatter Messenger is moving on to the greener pastures of Pebble Beach. Bon voyage!

#### Chatter Desktop: Retiring in Spring '17

Chatter Desktop is retiring in Spring '17. He looks forward to spending more time with his family, enjoying little umbrella drinks, and spending quality time on the golf course with Chatter Messenger.

#### Chatter Desktop: Version 3.2.3 Released

We released Chatter Desktop version 3.2.3 on March 4, 2016, and included an installer certificate update.

#### Files

Salesforce Files has grown up and moved out on its own! Since Files now works whether Chatter is on or off, we've moved it to its own section. This feature is available in both Lightning Experience and Salesforce Classic.

### Groups

Create broadcast groups, add groups to communities, and review group member activity in the new group engagement report. Groups in Lightning Experience now support custom banner images and customer groups.

#### IN THIS SECTION:

### Keep Discussions Focused with Broadcast Groups—Generally Available

Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can create posts. Group members can respond to posts. Creating broadcast groups is ideal when one person or a set of individuals regularly needs to share information with a large group of people. This feature is available in both Lightning Experience and Salesforce Classic.

### Add Fun and Color to Groups with Banner Images

Update group banners with your own images to include your company's branding on your group page or to add a bit of fun and color. Previously, groups in Lightning Experience used distinct, non-customizable banner images for public, private, and unlisted groups. This feature is available in Lightning Experience only.

### Lightning Experience Now Supports Customer Groups

Create groups that allow customers and add customers to those groups in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

### Monitor Group Member Activity in Group Report

View group member engagement in a convenient report linked from each group. See the number of members, posts, comments, likes, questions, and answered questions in a single view for each group. This feature is available in Salesforce Classic only.

#### More Groups, More Collaboration

Users can now join and create more groups, which means more collaboration across the company! An individual user can be a member of up to 300 groups. Each Salesforce org can contain up to 30,000 groups. Archived groups don't count toward individual and org-level group limits. This enhancement is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

#### Napili Communities Now Support Groups

Add groups to your Napili community with minimal setup by using out-of-the-box pages and components. This requires the Winter '16 or Spring '16 version of the Napili template. This feature is available in Salesforce Classic only.

### Allow Record Creation in Groups for Custom Objects Not Allowed in Groups

Users with permissions can now use the group publisher to create custom object records in groups, even if the custom object settings don't allow records of that type in groups. This makes it convenient for users to create records from anywhere, including the group context. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile app.

### Send Email Notifications for Group Announcements (Beta)

Group owners and managers can now send email notifications to all group members for group announcements, regardless of their email notification settings. Previously, group members would receive email notifications for announcements only if they opted to be notified for each post. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

### Keep Discussions Focused with Broadcast Groups—Generally Available

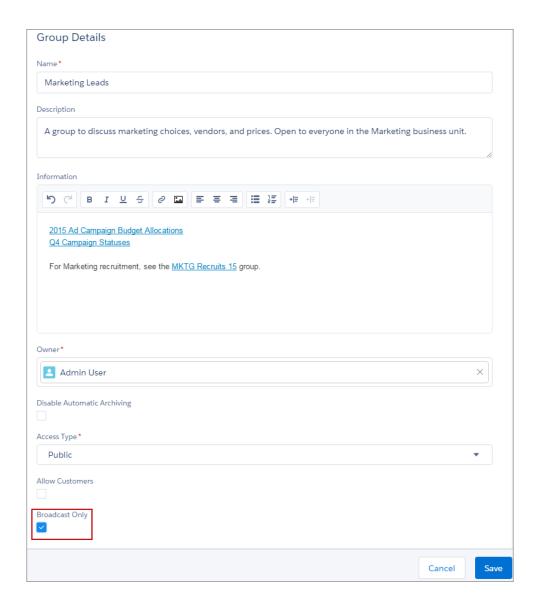
Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can create posts. Group members can respond to posts. Creating broadcast groups is ideal when one person or a set of individuals regularly needs to share information with a large group of people. This feature is available in both Lightning Experience and Salesforce Classic.

To create a broadcast group, go to the group settings for any public, private, or unlisted group and select **Broadcast Only**. By restricting the ability to post, group owners and managers can keep group discussions focused and relevant by cutting down noise from off-topic posts.



**Example**: Here are some scenarios in which you could consider creating broadcast groups:

- Organization-wide updates from the executive leadership in the company
- Policy changes from your company's HR department
- Event updates from the organizer of large events or company conferences
- Important action alerts from key IT personnel, including their awesome Salesforce administrator



Broadcast groups are supported in Chatter REST API.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

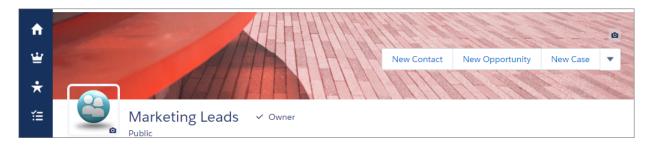
### Add Fun and Color to Groups with Banner Images

Update group banners with your own images to include your company's branding on your group page or to add a bit of fun and color. Previously, groups in Lightning Experience used distinct, non-customizable banner images for public, private, and unlisted groups. This feature is available in Lightning Experience only.

To update the group banner, click the camera icon on the top right of the image. For best results, use a panoramic image that is at least 1280 x 300 pixels and less than 8 MB in size. You can also delete your custom banner image and revert to the default banner image associated with that type of group.



**Example**: Updated banner image in a group.



Group banner images are supported in Chatter REST API and Chatter in Apex.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Lightning Experience Now Supports Customer Groups

Create groups that allow customers and add customers to those groups in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

Previously, this functionality was supported only in Salesforce Classic.

To allow customers in a group, first create a private group and then select **Allow Customers** in the group settings. Use the **Add Member** action to add customer users as members. If you don't see the Add Member action, check that it is included in the group publisher layout.



**Note:** Group owners and managers still can't invite customers to a group using their email addresses. The customer must exist as a user in the Salesforce org before they can be added to a customer group.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Monitor Group Member Activity in Group Report

View group member engagement in a convenient report linked from each group. See the number of members, posts, comments, likes, questions, and answered questions in a single view for each group. This feature is available in Salesforce Classic only.

Anyone with permissions can view the group engagement report. Group owners, managers, and other users with permissions (for example, users with the "Modify All Data" and "Manage Unlisted Groups") can quickly access this report by clicking **Show Group Report** below the group photo.



**Example:** Sample group report



### More Groups, More Collaboration

Users can now join and create more groups, which means more collaboration across the company! An individual user can be a member of up to 300 groups. Each Salesforce org can contain up to 30,000 groups. Archived groups don't count toward individual and org-level group limits. This enhancement is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Napili Communities Now Support Groups

Add groups to your Napili community with minimal setup by using out-of-the-box pages and components. This requires the Winter '16 or Spring '16 version of the Napili template. This feature is available in Salesforce Classic only.

For more details, see Add Groups to Drive Collaboration in Your Napili Community.

### Allow Record Creation in Groups for Custom Objects Not Allowed in Groups

Users with permissions can now use the group publisher to create custom object records in groups, even if the custom object settings don't allow records of that type in groups. This makes it convenient for users to create records from anywhere, including the group context. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

In the custom object definition, the **Allow in Chatter Groups** setting controls whether records of that object are allowed in groups. Previously, if this checkbox was cleared, users couldn't create records of that type in groups. Now, users with permissions can create the records for that object type from the group publisher, but the record is not associated with the group and it isn't included in the list of group records. This opens up the group context to more record creation without creating a relationship between the record and the group.

To create custom object records, the user must have the necessary permissions to access the group and create records of that type. Also, the administrator must include the publisher action to create the record in the group publisher layout.

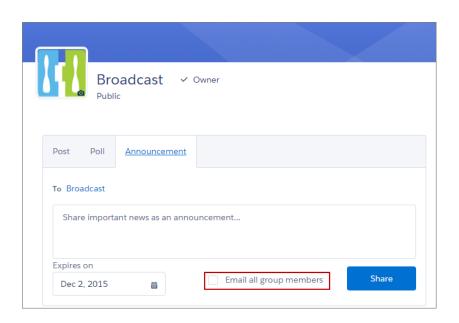
### Send Email Notifications for Group Announcements (Beta)

Group owners and managers can now send email notifications to all group members for group announcements, regardless of their email notification settings. Previously, group members would receive email notifications for announcements only if they opted to be notified for each post. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile app.

Group owners and managers require the "Send emails on announcements" permission to do this. To send notifications, select **Email all group members** next to the announcement expiration date.



**Note:** This release contains a beta version of email notifications for group announcements, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce Support. Email notifications for group announcements 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.



SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### **User Profiles**

Upload a banner photo on your profile, see everyone's photo on the People page, and use a circular cropping tool when editing your photo.

### IN THIS SECTION:

### Jazz up User Profiles with a Banner Photo

A banner photo allows your users to personalize how their profile looks when other users view it. It appears at the top of the profile page in Lightning Experience. Your users can upload any photo, but we recommend using a panoramic photo that is at least 1280 x 300 pixels. This feature is available in Lightning Experience only.

### Improved Photo Upload and Editing Experience

We simplified the profile photo experience by adding a drop-down menu that appears when a user clicks the upload icon. The user can then quickly choose to view, update, or delete their photo. This feature is available in Lightning Experience only.

#### Circular Photo Preview

When a user uploads a photo, the preview should look exactly like what appears on their profile. We improved the photo experience, so that a user sees a circular version of their photo when previewing or cropping. This feature is available in Lightning Experience, Salesforce 1 Mobile Browser App, and in communities created using the Koa, Kokua, or Napili templates.

#### Profile Photos on the People Page

Whether it's a picture of your four-legged friend, a superhero, or your best glamour shot, photos help people recognize and learn about each other. We made the People page more useful and fun by adding users' photos. This feature is available in Lightning Experience only.

### More Chatter Users Can Access Lightning Experience

Users with Chatter Free, Chatter Plus, and Chatter External licenses can now use Lightning Experience.

### Role Field on User Search Layout

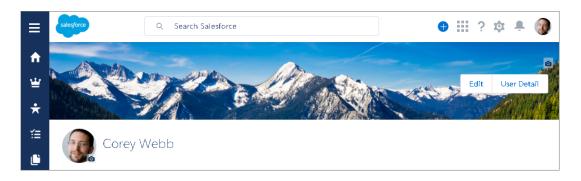
We removed the Role field from the out-of-box User Search Layout. If you customized the User Search Layout before Spring '16, you will still see this field.

### Jazz up User Profiles with a Banner Photo

A banner photo allows your users to personalize how their profile looks when other users view it. It appears at the top of the profile page in Lightning Experience. Your users can upload any photo, but we recommend using a panoramic photo that is at least 1280 x 300 pixels. This feature is available in Lightning Experience only.

Before Spring '16, banner photos weren't enabled by default. Now, banner photos will be turned on for all organizations using Lightning Experience.

- 1. On the profile page, in the upper-right corner of the blue banner, click
- 2. Click Select an Image, then choose your photo.
- **3.** Drag the photo until the region you want to show as your banner appears in the highlighted portion. If you decide you want to use a different photo, click **Choose a different photo**.
- 4. Click Save.
- **Example**: Profile with a banner photo:



User profile banner photos are supported in Chatter REST API and Chatter in Apex.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Improved Photo Upload and Editing Experience

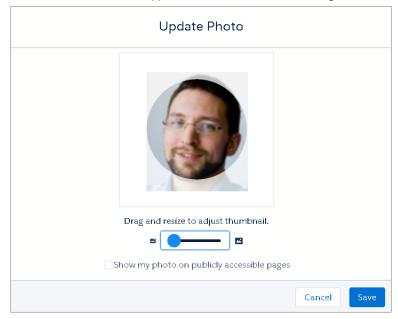
We simplified the profile photo experience by adding a drop-down menu that appears when a user clicks the upload icon. The user can then quickly choose to view, update, or delete their photo. This feature is available in Lightning Experience only.

Clicking the new photo upload icon ( ) on the profile photo displays the menu.



### Circular Photo Preview

When a user uploads a photo, the preview should look exactly like what appears on their profile. We improved the photo experience, so that a user sees a circular version of their photo when previewing or cropping. This feature is available in Lightning Experience, Salesforce Mobile Browser App, and in communities created using the Koa, Kokua, or Napili templates.

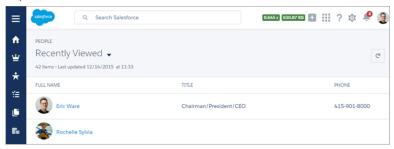


SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Profile Photos on the People Page

Whether it's a picture of your four-legged friend, a superhero, or your best glamour shot, photos help people recognize and learn about each other. We made the People page more useful and fun by adding users' photos. This feature is available in Lightning Experience only.



SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### More Chatter Users Can Access Lightning Experience

Users with Chatter Free, Chatter Plus, and Chatter External licenses can now use Lightning Experience.

Just like in Salesforce Classic, users with these licenses see only Chatter features, such as the feed, profiles, groups, and files. If Chatter is disabled in a Lightning Experience org, these users see only their profiles.

While users with Chatter External licenses can edit their profile in Salesforce Classic, they can't edit it in Lightning Experience.

### Role Field on User Search Layout

We removed the Role field from the out-of-box User Search Layout. If you customized the User Search Layout before Spring '16, you will still see this field.

### **Feeds**

 $Edit\ posts\ with\ files\ and\ links, see\ more\ relevant\ suggestions\ when\ mentioning\ people, and\ refresh\ the\ feed\ easily\ in\ Lightning\ Experience.$ 

#### IN THIS SECTION:

#### Edit Chatter Posts Containing Files or Links

So you wrote an awesome Chatter post and attached an even more awesome picture, but then you forgot to @mention your boss. Previously, you had to use comments to make any changes to Chatter posts that contained files or links. Now you can simply edit the original post. This feature is available in Salesforce Classic and the Napili template in Salesforce Communities.

### More Relevant @Mention Suggestions

Now, it's quicker than ever to keep everyone informed. User @mention suggestions are more relevant and list users who you interact with the most instead of an alphabetical list. Also, you see a customer on the list only when you're in a group where the customer is a member, and not in other contexts. This feature is available in both Lightning Experience and Salesforce Classic.

### Refresh the Chatter Feed Lightning-Fast in Lightning Experience

See poll results or your coworkers' comments on your Chatter post faster than before. Users can now refresh a Chatter feed without refreshing the entire page. This feature is available in Lightning Experience only.

### Edit Chatter Posts Containing Files or Links

So you wrote an awesome Chatter post and attached an even more awesome picture, but then you forgot to @mention your boss. Previously, you had to use comments to make any changes to Chatter posts that contained files or links. Now you can simply edit the original post. This feature is available in Salesforce Classic and the Napili template in Salesforce Communities.

0

**Example**: Edit a Chatter post containing an attached file.

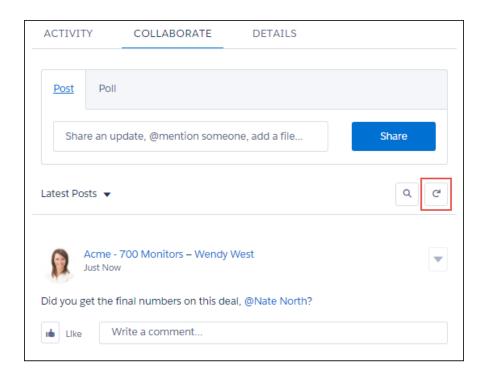


### More Relevant @Mention Suggestions

Now, it's quicker than ever to keep everyone informed. User @mention suggestions are more relevant and list users who you interact with the most instead of an alphabetical list. Also, you see a customer on the list only when you're in a group where the customer is a member, and not in other contexts. This feature is available in both Lightning Experience and Salesforce Classic.

### Refresh the Chatter Feed Lightning-Fast in Lightning Experience

See poll results or your coworkers' comments on your Chatter post faster than before. Users can now refresh a Chatter feed without refreshing the entire page. This feature is available in Lightning Experience only.



Click the refresh button on a Chatter feed to refresh the feed's content.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

# **Digest Emails**

Get the redesigned, reorganized, mobile friendly personal digest.

IN THIS SECTION:

Personal Digest Emails: Redesigned and Better Coordinated with Group Digests (Generally Available)

Redesigned emails put higher priority posts, such as posts on your profile and mentions, at the top, group posts under their parent group or object, and are optimized for display on mobile devices. We also reduced overlap with group digests by excluding posts that are already included in group digests. This feature is available in both Lightning Experience and Salesforce Classic.

# Personal Digest Emails: Redesigned and Better Coordinated with Group Digests (Generally Available)

Redesigned emails put higher priority posts, such as posts on your profile and mentions, at the top, group posts under their parent group or object, and are optimized for display on mobile devices. We also reduced overlap with group digests by excluding posts that are already included in group digests. This feature is available in both Lightning Experience and Salesforce Classic.

The new format includes group photos for easier recognition and field values on records to summarize the status of the account, contact, case, or custom object.

Depending on when your org gets the release and when your users get their digests, some users could receive two digests with the same content. For example, users who got their personal digest in the 12 hours before the release receive the enhanced version of the same digest shortly after the release. Thereafter, personal digests conform to your users' normal digest schedule.

While no setup is required for the digest changes, consider improving your users' experience by creating custom compact layouts. The personal digest uses an object's primary compact layout to determine which fields are displayed. You can create a custom compact layout and set it as the primary. We recommend limiting the total number of fields to four or fewer. Users see only fields that they have access to. Note these field value limitations:

- Field values are not localized
- Some data types, such as checkboxes, are not rendered optimally

Tip: To take advantage of the enhanced digest and to streamline email volume, we recommend that your users:

- Set personal digest frequency to Daily
- Change daily and weekly group digests to Never
- Don't change group digests set to Email on every post

SEE ALSO:

Salesforce Help: Compact Layouts

# Chatter Messenger: Retiring in Spring '17

It's sad but true: Chatter Messenger is retiring in Spring '17. After many years of faithfully relaying instant messages between coworkers, Chatter Messenger is moving on to the greener pastures of Pebble Beach. Bon voyage!

What this means for you: Chatter Messenger isn't available in Salesforce orgs created Spring '16 or later. If you enabled Chatter Messenger before Spring '16, it remains available in your Salesforce org. Salesforce will no longer support Chatter Messenger as of Spring '17.

# Chatter Desktop: Retiring in Spring '17

Chatter Desktop is retiring in Spring '17. He looks forward to spending more time with his family, enjoying little umbrella drinks, and spending quality time on the golf course with Chatter Messenger.

What this means for you: Chatter Desktop won't be available in Salesforce orgs created in Spring '17 or later. If you enabled Chatter Desktop before Spring '17, it will remain available in your Salesforce org. Salesforce will no longer support Chatter Desktop as of Spring '17.

# Chatter Desktop: Version 3.2.3 Released

We released Chatter Desktop version 3.2.3 on March 4, 2016, and included an installer certificate update.

### **Files**

Salesforce Files has grown up and moved out on its own! Since Files now works whether Chatter is on or off, we've moved it to its own section. This feature is available in both Lightning Experience and Salesforce Classic.

Go to Salesforce Files Release Notes

# Files: Share Files in Lightning, Use Files Without Chatter, and More

Files now works whether Chatter is on or off. Share files with people and groups in Lightning Experience. Manage access to files in new ways. Navigate your libraries in Files Home, and your Files Connect external sources when selecting files to post in Lightning. Devour this section to learn about all these juicy new features and more!

### **EDITIONS**

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

#### IN THIS SECTION:

#### Files Without Chatter

Now you can use Salesforce Files whether Chatter is on or off! You don't use Chatter, but you

want to take advantage of the awesome features of Salesforce Files? No problem! Your files are welcome here. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app. For users of the Salesforce1 downloadable apps, Files is not available if Chatter is off.

#### Share Files with People and Groups in Lightning Experience

Sharing files has never been easier. Share a file directly with people and groups. Manage access to the file in one place. Control whether others can share and unshare a file. Save typing time by adding recommended people and groups. This feature is available in Lightning Experience only.

### Preview Files Connect External Google Docs in Lightning Experience

Now playing in the Lightning file preview player: Google Docs! If you have Google Drive set up as one of your Files Connect external sources, your view just got better. Google Docs, Sheets, and Slides display beautifully in the file preview player in Lightning Experience. This feature is available in Lightning Experience only.

#### Browse Files Connect External Sources When Selecting Files in Lightning Experience

Now you can browse Files Connect external sources such as Google Drive, Box, and SharePoint when selecting a file to attach to a feed post in Lightning Experience. This feature is available in Lightning Experience only.

### Open Files from SharePoint Online and OneDrive for Business With One Click

Using Files Connect to access files from SharePoint Online and OneDrive for Business just got a whole lot easier. Now, when users click to open a file, they're redirected to the appropriate Microsoft online app (such as Word, Excel, and PowerPoint) instead of the file detail page. And fewer clicks means better use of time. This feature is available in both Lightning Experience and Salesforce Classic.

### Files Connect for Box (Pilot)

Now you can use Files Connect to access your Box files in Salesforce. Files Connect for Box is a pilot feature in this release. If you want to be part of the pilot, contact your Salesforce AE to enable it for you.

#### Navigate Libraries in Files Home in Lightning Experience

Files home in Lightning now lets you view the libraries you have access to, and navigate those libraries to see the files they contain. This feature is available in Lightning Experience only.

### View Multi-File Community Record Feed Posts in Lightning Experience

Community users can now attach multiple files to a single post. When a multi-file feed post on a record in a Community is viewed in Lightning, multiple thumbnails and previews are displayed. This feature is available in Lightning Experience only.

#### Upload Files to Notes & Attachments List in Salesforce Classic

Files that you upload to the Notes & Attachments related list on records in Salesforce Classic are now Salesforce Files objects, rather than the old attachment objects. A new org pref in Salesforce Files Settings controls this behavior, and is enabled by default for new orgs. This feature is helpful for orgs that want to migrate from attachments to files, but still need to keep their existing notes and attachments. This feature is available in Salesforce Classic only.

### New "Set by Record" Access for Shared Files

When a link is created between a file and a record with inferred sharing type via the API, the access level when sharing the file in the UI is **Set by Record**. The **Set by Record** access level means that access to the file is determined by the level of access to the record that the file is linked to. This feature is available in both Lightning Experience and Salesforce Classic.

### Files Sync Supports OSX El Capitan

Salesforce Files Sync now supports Mac OSX El Capitan.

SEE ALSO:

Get Metrics on How Your Users Search for Files

### Files Without Chatter

Now you can use Salesforce Files whether Chatter is on or off! You don't use Chatter, but you want to take advantage of the awesome features of Salesforce Files? No problem! Your files are welcome here. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app. For users of the Salesforce1 downloadable apps, Files is not available if Chatter is off.

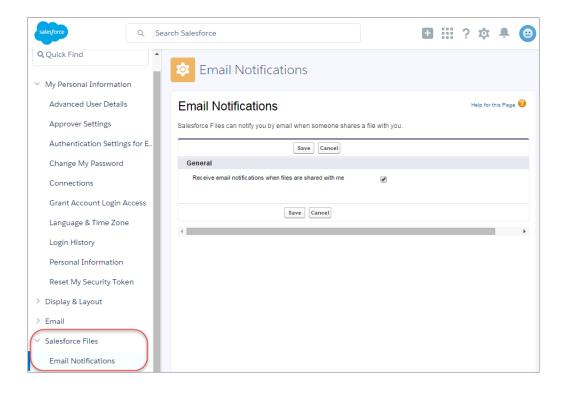
### What's New When Chatter Is Off

- The Files tab (Files home) is available: upload, share, view, and manage files
- The Files related list is available for adding to page layouts on records: attach Salesforce Files to records, manage them outside of the record, and view files associated with a record
- Share files with people
- In Salesforce Classic only, share files with libraries (when Salesforce CRM Content is enabled for the org and user) and companies
- Use the many features of Salesforce Files such as previewing files, viewing file details, uploading new versions, and manage access to files
- Manage email notifications for files separately from Chatter Settings

Files without Chatter is supported in Chatter REST API.

### Get Files Email Notifications Without Chatter

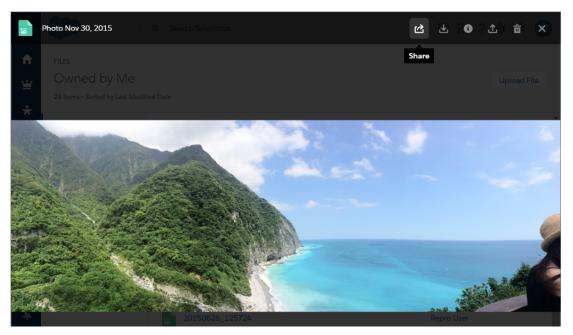
Even when Chatter is off, you can still decide whether to receive email notifications when files are shared with you. Manage this setting outside of Chatter Email Notifications. Instead, go to **Settings** > **Salesforce Files** > **Email Notifications**.



# Share Files with People and Groups in Lightning Experience

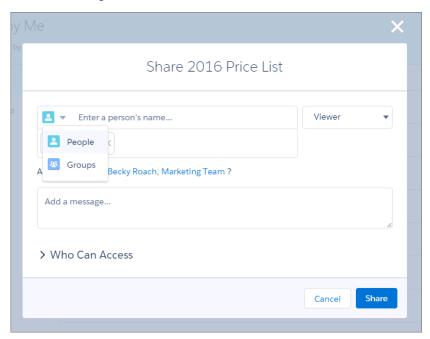
Sharing files has never been easier. Share a file directly with people and groups. Manage access to the file in one place. Control whether others can share and unshare a file. Save typing time by adding recommended people and groups. This feature is available in Lightning Experience only.

Share a file from Files home, the file detail page, or the file preview player.



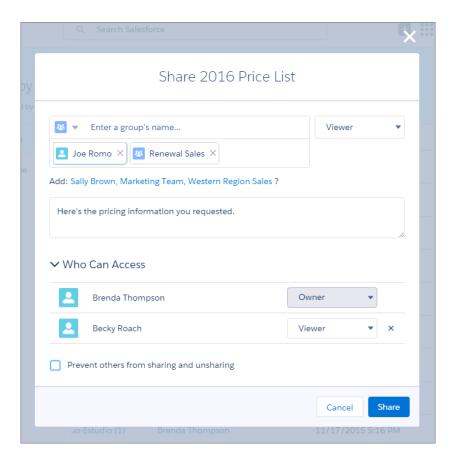
# Quickly Share a File

Share a file with people, groups, or both. Toggle between them to find the ones you want. Click any recommended people and groups you want to add. Choose **Viewer**, **Collaborator**, or other level of access for each set of people and groups you share the file with. If you want, add a message.



### See Who Can Access a File

Want to check out who can access the file? Need to make some changes to that? Expand the **Who Can Access** section. Delete shares or change levels of access. Use **Prevent others from sharing and unsharing** if you don't want those you've shared the file with to be able to change who can access it.

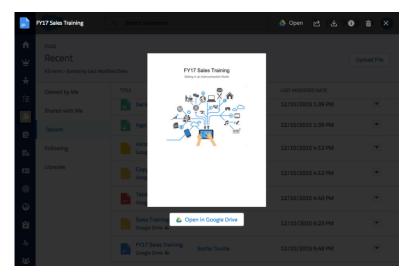


# Preview Files Connect External Google Docs in Lightning Experience

Now playing in the Lightning file preview player: Google Docs! If you have Google Drive set up as one of your Files Connect external sources, your view just got better. Google Docs, Sheets, and Slides display beautifully in the file preview player in Lightning Experience. This feature is available in Lightning Experience only.



When you click on a Google file from anywhere in Lightning Experience – Files Home, a feed post, the Files related list on a record – the file preview player displays a one-page preview of the file. From there, you can open the file in Google Drive, or use any of the quick actions in the previewer toolbar. Some non-native Google files (such as PDFs, images, and Word documents) that you've imported to your Google Drive can also be previewed.



Previewing Files Connect external Google Docs is supported in Chatter REST API.

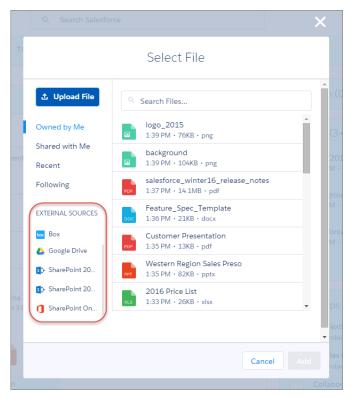
# Browse Files Connect External Sources When Selecting Files in Lightning Experience

Now you can browse Files Connect external sources such as Google Drive, Box, and SharePoint when selecting a file to attach to a feed post in Lightning Experience. This feature is available in Lightning Experience only.



Note: Files Connect Cloud Connectors now support Professional Edition.

Do you have Files Connect external sources in Salesforce? If so, you might want to attach files from these external sources to your feed posts. Now, you can not only select these files; you can also browse your external sources in the left navigation of the Select File window.



Do you have multiple repositories for the same source, such as SharePoint or Google Drive? You'll see all of them here. This gives you faster and easier access to all your externally connected files.

# Open Files from SharePoint Online and OneDrive for Business With One Click

Using Files Connect to access files from SharePoint Online and OneDrive for Business just got a whole lot easier. Now, when users click to open a file, they're redirected to the appropriate Microsoft online app (such as Word, Excel, and PowerPoint) instead of the file detail page. And fewer clicks means better use of time. This feature is available in both Lightning Experience and Salesforce Classic.



Note: Files Connect Cloud Connectors now support Professional Edition.

Files in formats that Office Online doesn't support continue to redirect to the SharePoint or OneDrive for Business file detail page. One-click access isn't available for SharePoint 2010 and SharePoint 2013 files.

## Files Connect for Box (Pilot)

Now you can use Files Connect to access your Box files in Salesforce. Files Connect for Box is a pilot feature in this release. If you want to be part of the pilot, contact your Salesforce AE to enable it for you.

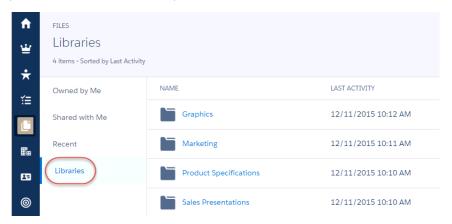


Note: Files Connect Cloud Connectors now support Professional Edition.

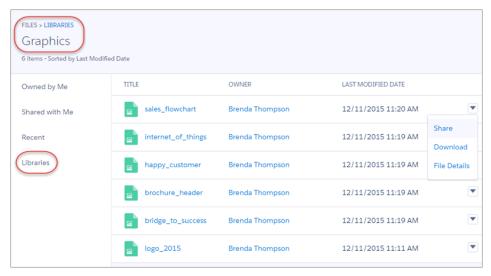
### Navigate Libraries in Files Home in Lightning Experience

Files home in Lightning now lets you view the libraries you have access to, and navigate those libraries to see the files they contain. This feature is available in Lightning Experience only.

Files from any libraries you can access were already listed in Files home in Lightning. But to view a list of those libraries and see which files each one contains, you had to switch to Salesforce Classic. Now, you'll see Libraries in the left navigation in Files home. On the right, you'll have a list of all the libraries you can access.



Each library is displayed as a folder, which you can click to open and see all the files in it.



The same actions that were previously available on files in libraries are still available, such as sharing, uploading new versions, downloading, and deleting. But now you can quickly access all your library files in one place, and go right to the library you need.

# View Multi-File Community Record Feed Posts in Lightning Experience

Community users can now attach multiple files to a single post. When a multi-file feed post on a record in a Community is viewed in Lightning, multiple thumbnails and previews are displayed. This feature is available in Lightning Experience only.

# Multiple Thumbnails in the Feed

When a community user attaches multiple files to a feed post on a record in their community, multiple thumbnails are displayed in the feed. When the same record is viewed in Lightning Experience, the thumbnails are visible there, too.

### Multiple Files in the Preview Player

When you click one of multiple thumbnails in a feed post, the Lightning file preview player lets you navigate through all the files.

# Upload Files to Notes & Attachments List in Salesforce Classic

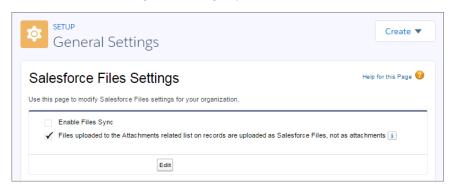
Files that you upload to the Notes & Attachments related list on records in Salesforce Classic are now Salesforce Files objects, rather than the old attachment objects. A new org pref in Salesforce Files Settings controls this behavior, and is enabled by default for new orgs. This feature is helpful for orgs that want to migrate from attachments to files, but still need to keep their existing notes and attachments. This feature is available in Salesforce Classic only.

Attachments and Salesforce Files are two different types of objects. Attachments are files uploaded to the Notes & Attachments related list on records; they exist in Salesforce only in the context of the record they're attached to. They're not available for sharing, adding to libraries, or in any other context. Salesforce Files are what you upload to Files home, in feeds, and anywhere else you add files in Salesforce.

We introduced the Files related list in Winter '16 for customers who want to make the move from the older-style attachments to feature-rich Salesforce Files. Since many customers still need access to their existing notes and attachments, we've kept the Notes & Attachments related list. When you upload a file to the Notes & Attachments list in Lightning Experience, it becomes a Salesforce File, not an attachment. But the files you've been uploading to the same list in Salesforce Classic were still attachments.

Still reading? Good! Now, when your users upload a file to the Notes & Attachments related list on a record in Salesforce Classic, it becomes a Salesforce File. This doesn't change who can see the file, but it does mean the file can have hopes and dreams no attachment could ever have. It can be shared with people, groups, libraries, and companies. It can be posted in feeds, synced, and updated with new versions. It's going to get all kinds of love it couldn't get before.

The new behavior of files uploaded to the Notes & Attachments related list is enabled by default for new orgs. Existing orgs can enable it with a new preference in Salesforce Files General Settings. (From Setup, enter Salesforce Files in the Quick Find box, then select **General Settings**.) This setting only affects the Notes & Attachments related list in Salesforce Classic.



# New "Set by Record" Access for Shared Files

When a link is created between a file and a record with inferred sharing type via the API, the access level when sharing the file in the UI is **Set by Record**. The **Set by Record** access level means that access to the file is determined by the level of access to the record that the file is linked to. This feature is available in both Lightning Experience and Salesforce Classic.

See ContentDocumentLink in the API Object Reference for more information on creating a link between a file and a record using the inferred sharing type.

When a file is linked to a record using the inferred sharing type via the API, Sharing Settings (in Salesforce Classic) and Share File (in Lightning Experience) show **Set by Record** as the level of access when you share the file.

### **Set by Record** Access in Salesforce Classic



### Set by Record Access in Lightning Experience



### Files Sync Supports OSX El Capitan

Salesforce Files Sync now supports Mac OSX El Capitan.

File syncers on Mac, feel free to upgrade to OSX El Capitan! We support it.

# Search: Finding Information

Help your users quickly find the information they need. Some Spring '16 search changes will be immediately noticed (and appreciated) by users, such as search term spell correction. In Lightning Experience, we're introducing search results sorting, enhanced formatting for instant results, expanded lineup of searchable objects, and a new button for custom objects and records inside lookups. Behind the scenes but still enhancing the search experience is expanded scope for synonym groups.



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

For more information about searching, check out the improved, streamlined documentation in the Salesforce Help under "Find Information with Search".

### IN THIS SECTION:

### Synonym Groups Enabled for More Objects and Maximum Limit Increased

All your synonym groups are now available in Salesforce Knowledge articles, cases, Chatter feeds, files, ideas, and questions. The synonym group maximum limit per org also increased from 3,000 to 10,000. Users see more relevant search results in just one search. This feature is available in both Lightning Experience and Salesforce Classic.

#### Spell Correction Expanded to More Objects

When users enter a search term that doesn't yield results, they see results that match a corrected spelling of the search term in Salesforce Knowledge articles, Chatter feeds, Chatter groups, files, and questions. Spell correction is available only in English. This feature is available in both Lightning Experience and Salesforce Classic.

#### Search Returns Matches for Different Forms of Search Terms

Find your records with less guessing. The search engine returns results for expanded forms of your search term. This feature is available in both Lightning Experience and Salesforce Classic.

#### Get Metrics on How Your Users Search for Files

Use the File Search Activity custom report type to review average click rank, number of search results returned, and the search terms users are entering for the top 300 search terms queried by users. Based on the report information, determine if users are finding the files they need or if file editing or creation is required. This feature is available in both Lightning Experience and Salesforce Classic.

### Find a Record Faster with Search Results Sorting

If available, search results pages now include a sort drop-down. In addition, users can click the column headers to sort results. Users find sorting helpful when faced with too many search results, even within a specific object type. This feature is available in Lightning Experience only.

#### Instant Results Look Even Better

The improved field formatting for number, date, time, and address fields in instant search results helps users pick the right record. When possible, auto-suggested instant results include a secondary field below the record name that has more contextual information from search layout fields. The additional information, such as location, makes choosing the right auto-suggested record easier. This feature is available in Lightning Experience only.

### More Objects Searchable in Lighting Experience

Users now see results for assets, campaigns, person accounts, work orders, and work order line items in search results. This feature is available in Lightning Experience only.

### Create a Custom Object Item from Within a Lookup

Using the **New** button, users don't have to leave the lookup window to create records to complete a lookup field, so they can complete their tasks faster. This feature is available in Lightning Experience only.

### Synonym Groups Enabled for More Objects and Maximum Limit Increased

All your synonym groups are now available in Salesforce Knowledge articles, cases, Chatter feeds, files, ideas, and questions. The synonym group maximum limit per org also increased from 3,000 to 10,000. Users see more relevant search results in just one search. This feature is available in both Lightning Experience and Salesforce Classic.

When you create a synonym group, the group is enabled for all supported objects.

Synonym groups have words or phrases that are treated equally in searches. A search for one term in a synonym group returns results for all terms in the group. For example, a search for *USB* returns results for all the terms in a synonym group containing *USB*, thumb drive, flash stick, and memory stick.

Because more objects are supported, the Setup page to manage synonym groups changed from Knowledge Synonyms to Synonyms in Salesforce Classic. Admins make changes to synonyms in the Salesforce Classic setup.

#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

# Spell Correction Expanded to More Objects

When users enter a search term that doesn't yield results, they see results that match a corrected spelling of the search term in Salesforce Knowledge articles, Chatter feeds, Chatter groups, files, and questions. Spell correction is available only in English. This feature is available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

### Search Returns Matches for Different Forms of Search Terms

Find your records with less guessing. The search engine returns results for expanded forms of your search term. This feature is available in both Lightning Experience and Salesforce Classic.

Lemmatization reduces different inflected forms of a word to a single form depending on the context. For example, when you search for xun, you see results with run, running, and ran. Because the behavior applies only to the type of word (verb, for example) for which you're searching, unwanted results aren't returned.

Lemmatization is supported for these objects for specific languages.

- Case (including comments)
- Chatter Feed
- Chatter Group
- File
- Idea (including comments)
- Knowledge Article
- Question
- Solution

For more information, see "What Search Term Variations Will I See in the Search Results?" in the Salesforce Help.

### Get Metrics on How Your Users Search for Files

Use the File Search Activity custom report type to review average click rank, number of search results returned, and the search terms users are entering for the top 300 search terms queried by users. Based on the report information, determine if users are finding the files they need or if file editing or creation is required. This feature is available in both Lightning Experience and Salesforce Classic.

Salesforce Files available in: **All** editions, **except** Customer Portals

Walk Through It: Report on File Search Activity

For more information, see "Report on File Search Activity" in Salesforce Help.

# Find a Record Faster with Search Results Sorting

If available, search results pages now include a sort drop-down. In addition, users can click the column headers to sort results. Users find sorting helpful when faced with too many search results, even within a specific object type. This feature is available in Lightning Experience only.

The sort drop-down lists all the columns shown in the search results layout for the user to choose from. Results are sorted by relevance by default. If users sort from the Top Results page, they are taken to the object's results page to see a longer list of sorted results.



Sorting isn't supported for files and Chatter groups.

For more information, see "How Do I Refine Search Results in Lightning Experience?" in the Salesforce Help.

#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience Salesforce Help: Search: What's Not in Lightning Experience

### Instant Results Look Even Better

The improved field formatting for number, date, time, and address fields in instant search results helps users pick the right record. When possible, auto-suggested instant results include a secondary field below the record name that has more contextual information from search layout fields. The additional information, such as location, makes choosing the right auto-suggested record easier. This feature is available in Lightning Experience only.

Examples of enhanced formatting include:

- Currency fields match the field's or org's currency unit
- Time and date fields match the user's locale
- Numbers use localized separators and decimal points
- Address and other compound fields are readable without running together

#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

# More Objects Searchable in Lighting Experience

Users now see results for assets, campaigns, person accounts, work orders, and work order line items in search results. This feature is available in Lightning Experience only.

For more information, see "Searchable Objects and Fields" in Salesforce Help.

#### SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience Salesforce Help: Search: What's Not in Lightning Experience

# Create a Custom Object Item from Within a Lookup

Using the **New** button, users don't have to leave the lookup window to create records to complete a lookup field, so they can complete their tasks faster. This feature is available in Lightning Experience only.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience Salesforce Help: Search: What's Not in Lightning Experience

# Data.com: Prospecting in Lightning Experience, Critical Company Info for Leads, and More

Several key Data.com Prospector features are now available in Lightning Experience, including Company Hierarchy, Prospecting Insights, and the ability to discover contacts for accounts. Also in this release, Data.com Premium Clean customers can now automatically enrich leads with valuable company details.

Data.com delivers leading business data inside Salesforce. Using the Data.com product suite, your sales and marketing teams have all the information they need to convert leads, close deals, and maintain customer relationships. If you want complete, accurate, and relevant customer information, then check out Data.com.

The Data.com product suite includes Data.com Prospector and Data.com Clean, with two levels of data availability and features for each (Corporate and Premium). Data.com also provides more offerings for Salesforce customers, including the Data.com Assessment App (available on the AppExchange) and Data.com Duplicate Management.



**Note:** The Data.com database does not contain data from all the countries where Salesforce is used. Data.com documentation may be translated into languages used in countries not represented in the Data.com database.

You can now purchase a Data.com Prospector license as an add-on to your Force.com license. Force.com does not work with the Salesforce Lead object, read Force.com help for more information.

### IN THIS SECTION:

# Data.com Prospector

In this release, we made several key Data.com Prospector features available in Lightning Experience. Search millions of crowd-sourced contacts to get the right contacts at your accounts. Check out Prospecting Insights, which provides key business, financial, company hierarchy, and industry data on your accounts. Using our Company Hierarchy, view an account's corporate hierarchy and add new accounts to Salesforce with a click. Data.com Prospector features are available in both Lightning Experience and Salesforce Classic.

# Data.com Clean

Now Data.com Clean offers even more ways to maintain high-quality data and keep your records complete and up-to-date. Using our new clean rules, you can add vital company information to your Salesforce leads. Then your reps get the information they need when they need it. Data.com Clean features are available in both Lightning Experience and Salesforce Classic.

# **Data.com Prospector**

In this release, we made several key Data.com Prospector features available in Lightning Experience. Search millions of crowd-sourced contacts to get the right contacts at your accounts. Check out Prospecting Insights, which provides key business, financial, company hierarchy, and industry data on your accounts. Using our Company Hierarchy, view an account's corporate hierarchy and add new accounts to Salesforce with a click. Data.com Prospector features are available in both Lightning Experience and Salesforce Classic.



**Note:** To learn about availability of a specific Data.com Prospector feature in Lightning Experience, check out Data.com: What's Not in Lightning Experience.

# **EDITIONS**

Data.com Prospector license available in: Contact Manager (no Lead object), Group, Professional, Enterprise, Performance, Unlimited, and Force.com (no Lead object) Editions

### IN THIS SECTION:

# Find the Right Contacts to Close Deals in Lightning Experience

Prospect for the contacts you need right from an account and add them to your org in just a few clicks. You can filter by level, department, and more! With a Data.com Prospector license, you get the data you need when you need it. This feature is available in both Lightning Experience and Salesforce Classic.

### Get a Complete Business Picture for Accounts in Lightning Experience

Now you can see key prospecting insights for your accounts in Lightning Experience, including business basics, financial details, and competitive landscapes. This feature is available in both Lightning Experience and Salesforce Classic.

# See Company Hierarchy in Lightning Experience to Quickly Identify New Prospects

Now customers with a Data.com Premium Prospector license can see a visual representation of a company's hierarchy in Lightning Experience. Quickly review a company's branches, divisions, and subsidiaries to easily identify new prospects. Add new accounts to your org with a single click. This feature is available in both Lightning Experience and Salesforce Classic.

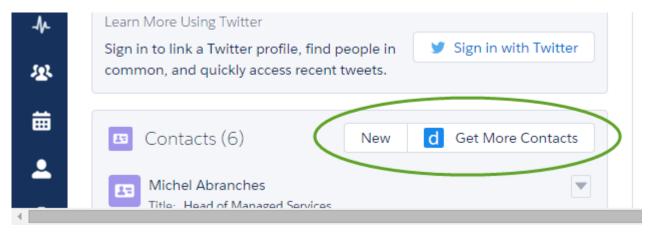
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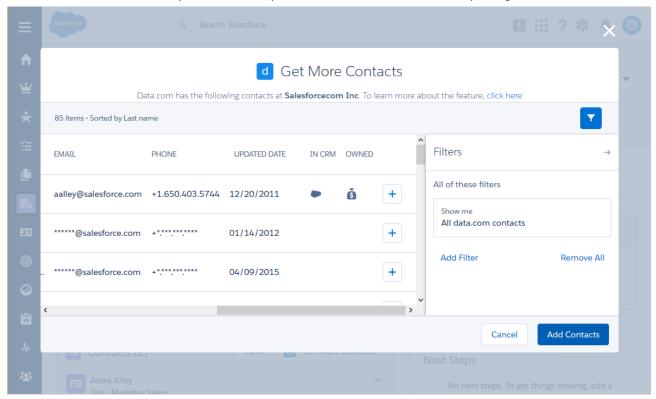
To add contacts right from an account page, just click **Get More Contacts**.



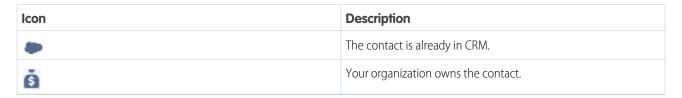
Note: Get More Contact is available only for accounts that were imported from, or cleaned by, Data.com.



Refine the results with filters. When you see the results you want, select and add the contacts to your org.



There are new icons to indicate which contacts are already in your organization and which contacts you own.



Enter multiple values from the **Department** and **Level** pick lists, or enter a comma-separated list of values in the **Title** filter.

Filter	Operators	Description
Department	equal	The department in the company that the contact is affiliated with. The values of this field are in a multiselect picklist.
		• Sales
		• Marketing
		• Finance
		Human Resources
		• Support
		• Engineering
		• Operations
		• IT

Filter	Operators	Description
		• Other
Level	equal	A human resource label that designates a person's level in the company. The values of this field are fixed enumerated values.
		• C-Level
		• VP
		• Director
		• Manager
		• Staff
		• Other
Title	<ul><li>equal</li><li>not equal to</li></ul>	Title of the contact, such as CEO or Vice President.
	• contins	This field accepts a comma-separated string of values, for example, CEO, Vice President, Manager

SEE ALSO:

Get a Complete Business Picture for Accounts in Lightning Experience

# Enable Get More Contacts Button in Lightning Experience for an Existing Org

The **Get More Contacts** button shows up on the account details page only when the **Button Preferences** in **Data.com Prospector Preferences** are selected.

Do you already have a Data.com Prospector license, but you don't see the **Get More Contacts** button on account details pages? Make sure the **Button Preferences** under **Data.com Prospector Preferences** are selected.

Here is what to do to make the **Get More Contacts** button show up on your org's account details pages.

- 1. From Setup, enter Prospector Preferences in the Quick Find box, then scroll to the **Button Preferences** Section.
- 2. Select Add to Salesforce for both Find Contacts and Find Accounts.
- 3. Click Save.

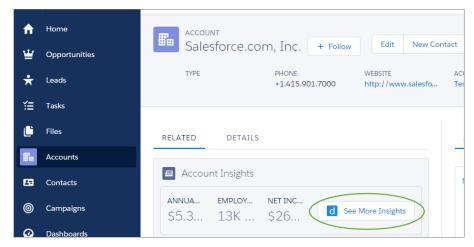
# Get a Complete Business Picture for Accounts in Lightning Experience

Now you can see key prospecting insights for your accounts in Lightning Experience, including business basics, financial details, and competitive landscapes. This feature is available in both Lightning Experience and Salesforce Classic.

If your company has a Data.com Prospector license and you've been assigned a seat, Prospecting Insights are available on the account detail page in Lightning Experience.

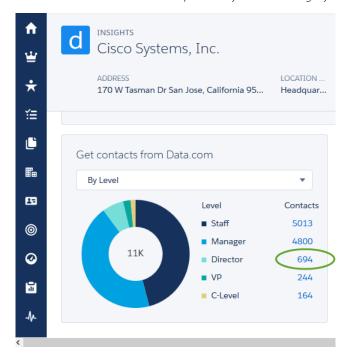
Note: Prospecting Insights are available only for records that were imported from, or cleaned by, Data.com.

To see complete insights, click **See More Insights** on an account details page.



# Prospecting Insights include:

- The company's stock market exchange and symbol, Standard and Poor's 500 index indicator, Fortune 1000 rank, delinquency risk, annual revenue, net income, and number of employees.
- Company overview and its primary and related industries, including SIC codes.
- The company's top competitors by revenue. A cloud icon identifies competitors that are already in Salesforce.
- Company contacts that are available from Data.com, viewable by level or department. To add contacts, click the number in the **Contacts** list for the level or department you want to begin your search.



# SEE ALSO:

Find the Right Contacts to Close Deals in Lightning Experience

# Make Sure You Can See Data.com Prospecting Insights in the Lightning Experience

**Data.com Prospecting Insights** shows up on the account home page only when **Account Insights** under **Account Settings** is selected.

Do you already have a Data.com Prospector license, but you don't see the **See More Insights** button on account details pages? Make sure **Enable Account Insights** under **Apps** > **Sales** > **Account Settings** is selected.

Here is what to do to make the **See More Insights** button show up on your org's account details pages.

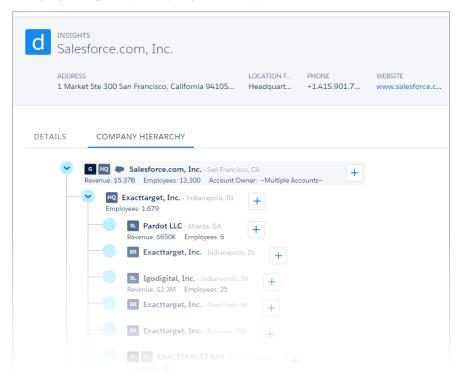
- 1. From Setup, enter Account in the Quick Find box, then select Account Settings.
- 2. Click Edit.
- 3. Select Enable Account Insights.
- 4. Click Save.

# See Company Hierarchy in Lightning Experience to Quickly Identify New Prospects

Now customers with a Data.com Premium Prospector license can see a visual representation of a company's hierarchy in Lightning Experience. Quickly review a company's branches, divisions, and subsidiaries to easily identify new prospects. Add new accounts to your org with a single click. This feature is available in both Lightning Experience and Salesforce Classic.

We use Dun & Bradstreet data to build the company hierarchy, showing the relationships between corporate entities. The hierarchy identifies global headquarters, headquarters with branches, divisions, and single-location entities.

For each company, you see annual revenue, the number of employees, and the account owner. A cloud icon identifies records that are already in your org, so reps can quickly see sales opportunities.



# Data.com Clean

Now Data.com Clean offers even more ways to maintain high-quality data and keep your records complete and up-to-date. Using our new clean rules, you can add vital company information to your Salesforce leads. Then your reps get the information they need when they need it. Data.com Clean features are available in both Lightning Experience and Salesforce Classic.



**Note**: To learn about availability of a specific Data.com Clean feature in Lightning Experience, check out Data.com: What's Not in Lightning Experience.

# **EDITIONS**

Data.com Clean available in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

### IN THIS SECTION:

### Automatically Enrich Leads with Critical Company Information (Beta)

Make it easier for your reps to pursue the most promising leads, and assign them to the right territories and campaigns. If your org has Data.com Premium Clean, it's a cinch! In just a few clicks, you can set up and activate the new Company Info for Leads clean rule for your organization. Then, valuable company information is automatically added to existing and new Salesforce leads, including annual revenue, industry, D-U-N-S number, and more! You can set up clean rules in Salesforce Classic only, but you can check the status of clean rules in both Salesforce Classic and Lightning Experience.

### Retirement of Data.com Social Key

As of Summer '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. This feature is available in Salesforce Classic only.

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**Note:** This release contains a beta version of the Company Info for Leads clean rule, which means it's a high-quality feature with known limitations. You can provide feedback and suggestions for the Company Info for Leads clean rule in the Lead Enrichment Group in the Salesforce Success Community.



Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

Even if your leads have only a name and email address, you can add a ton of valuable company information. That could be the difference between converting a lead and wasting your reps' time.

Once you set up and activate your organization's Company Info for Leads clean rule, existing leads get company information right away, and new leads get this information when they're saved. You get:

- Annual Revenue
- Company D-U-N-S Number
- D&B Company\*
- Industry
- No. of Employees

\*The D&B Company field is linked to over 100 more fields with company, industry, and financial information.

### IN THIS SECTION:

### Set Up the Company Info for Leads Clean Rule (Beta)

Using the Company Info for Leads Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing Salesforce leads. New and updated leads automatically get company information when they're saved.

# Check the Clean Status of the Company Info for Leads Clean Rule

The Company Info for Leads clean rule enriches your Salesforce leads with critical company information like annual revenue, D-U-N-S number, and number of employees. You can check whether an individual lead was processed with this clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

# Set Up the Company Info for Leads Clean Rule (Beta)

Using the Company Info for Leads Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing Salesforce leads. New and updated leads automatically get company information when they're saved.



- 1. From Setup, enter Clean Rules in the Quick Find box, then select Clean Rules.
- 2. Edit the Company Info for Leads clean rule.
- 3. Review your clean rule settings. To add company information to all existing leads, select Clean all records when this rule is activated or saved.
- **4.** Save the rule.
- **5.** Activate the rule.
  - If you selected Clean all records when this rule is activated or saved, company information is added to all existing leads. New leads are automatically enriched with company information when they're saved. If you have existing data, it is not overwritten. Only blank fields are filled in.

# **EDITIONS**

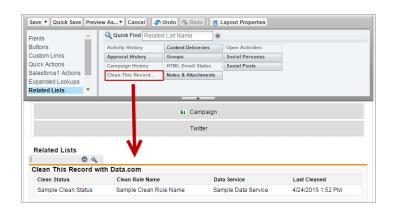
Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

# **USER PERMISSIONS**

To set up and activate clean rules:

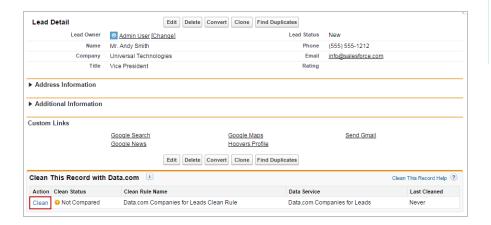
- "Customize Application"
- To edit page layouts:
- "Customize Application"
- 6. In Salesforce Classic, if you want to be able to check the clean status of the Company Info for Leads clean rule, add the Clean This Record with Data.com related list to the page layout for leads. (In Lightning Experience, this step isn't necessary!)



# Check the Clean Status of the Company Info for Leads Clean Rule

The Company Info for Leads clean rule enriches your Salesforce leads with critical company information like annual revenue, D-U-N-S number, and number of employees. You can check whether an individual lead was processed with this clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

- 1. Open the lead that you're checking.
- 2. Review the clean status for the Company Info for Leads clean rule. In Salesforce Classic, you'll find this status in the Clean This Record with Data.com section. (If you can't find the Clean This Record section, ask your Salesforce admin to add it to your page layout.) In Lightning Experience, click the Check Clean Status quick action to view the clean rule statuses
- 3. To manually clean the lead, click **Clean** for the Company Info for Leads clean rule.



# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

# **USER PERMISSIONS**

To clean leads:

"Edit" on leads

If your lead matches a record in the data service, any blanks are filled in for the Annual Revenue, Company D-U-N-S Number, D&B Company, Industry, and No. of Employees fields. Existing values are not overwritten. The Clean Status for the clean rule is updated. If you are unable to manually clean the lead, ask your administrator to set field-level security for the Annual Revenue, Company D-U-N-S Number, D&B Company, Industry, and No. of Employees fields so that you can update these fields.

Note: If you change the Address, Company D-U-N-S Number, Company, or Email fields, the Clean Status for the Data.com Company Info for Leads clean rule is set to Not Compared until the record is cleaned again. Fortunately, with clean rules, the lead is automatically cleaned again as soon as the lead is saved!

# Retirement of Data.com Social Key

As of Summer '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. This feature is available in Salesforce Classic only.

After the retirement of Data.com Social Key and the Data.com Social Profile Match API, social profile handles, such as those from LinkedIn®, aren't added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles.

You can still manually associate social profile handles with records.

# Customization: Easier Setup, Object Management and Flows, and Much More

We've got some key Lightning Experience enhancements—the ability to update your users' navigation menus and more resources dedicated to helping you migrate. Picklists are getting better and better with new restricted picklists and improved global picklists. And for you Process Builder mavens, a new drag-and-drop interaction makes reordering the contents of your process easy as 1-2-3.

Customization features help you expand your organization by enhancing your objects, data, and fields, customizing your organization's look and feel, augmenting your business processes, creating websites, and creating apps—all by using point-and-click tools and maybe some code. Customization features also include tools to administer and secure your organization.

### IN THIS SECTION:

### **General Administration**

Administration helps you manage your organization to suit your business needs.

# Migrate to Lightning Experience like a Boss

Whether you're curious if Lightning Experience is right for your organization, or you're ready to make the leap, Migration Assistant is here to guide you each step of the way. This feature is available in both Lightning Experience and Salesforce Classic.

### Lightning Experience Setup

Use Setup with more ease in Lightning Experience and save time. Lightning Experience expands your options for seamlessly interacting with data that's stored outside of your Salesforce organization. Lightning Experience also simplifies the user interface. This feature is available only in Lightning Experience.

# Lightning App Builder

This release, we've expanded our pilot for editing record pages in Lightning Experience by allowing you to create record pages from scratch, and by allowing Lightning pages to override the View standard button. We've also added new picklist functionality. This feature is available in both Lightning Experience and Salesforce Classic.

### **Data Customization**

We've improved the Data Import Wizard and Data Loader to make it easier for you to integrate your data with Salesforce.

### Lightning Connect

Lightning Connect has been renamed to Salesforce Connect. The Salesforce user interface and documentation will be updated to use the new feature name in Summer '16. Lightning Connect expands your options for seamlessly interacting with data that's stored outside your Salesforce organization.

### **Process Builder**

We've made it easier to create and modify your processes. You can now reorder criteria and action groups, automatically use existing names and descriptions when you clone a version of a process, view field names at a glance, and insert mentions directly into messages in Post to Chatter actions. This feature is available in both Lightning Experience and Salesforce Classic.

### Sharing

Sharing improves your control over who sees what. This feature is available in both Lightning Experience and Salesforce Classic.

# Monitoring

Keep tabs on your organization's security using one of Salesforce's many monitoring tools.

# **General Administration**

Administration helps you manage your organization to suit your business needs.

### IN THIS SECTION:

### Customize the Navigation Experience for Lightning Experience Users

Before this release, everyone had the same navigation menu. Now you can create different menus and tailor the navigation experience for your various types of users, such as sales reps, sales managers, and execs. You can add, remove, and move items so that users can go to the places they use most often with a single click. This feature is available in Lightning Experience only.

# URL Custom Button and Link Support in Lightning Experience and Salesforce1

Custom buttons and links that define their content source as URL are now supported in Lightning Experience and the Salesforce 1 mobile app. This feature was previously available in Salesforce Classic only.

### Select Whether a Ouick Action Creates a Feed Item On Execution

We added a field to the Create a Record and Log a Call action types that gives you control over whether the action creates a feed item after it executes. You can now reduce clutter and noise on your feeds from unnecessary record creation or logged call posts. This option is selected by default. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile app.

### Create Custom Success Messages for Quick Actions

For Create a Record, Update a Record, and Log a Call action types, you can create a custom message that displays when the action executes successfully. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

### Custom List View Buttons No Longer Available in the Enhanced Page Layout Editor

Custom buttons configured as a List Button were incorrectly available as quick actions in the Salesforce1 Actions bucket in the palette of the enhanced page layout editor. You could even add them to the Salesforce1 and Lightning Experience Actions section of the layout, although they didn't display on record pages. This change prevents these list view buttons from appearing in the palette. Custom list view buttons that you previously added to page layouts no longer display in the page layout editor.

# Delegate Admin Privileges to Select Users from Setup in Lightning Experience

You can now use Setup in Lightning Experience to assign limited admin privileges to users who aren't administrators. Delegating specific tasks to particular users allows you to focus on other work. For example, make the Customer Support team manager a delegated administrator to manage users in the Support Manager role and all subordinate roles. This feature is available in both Lightning Experience and Salesforce Classic.

### Eliminate Picklist Clutter with Restricted Picklists (Beta)

Enforce the integrity of your picklist data with restricted picklists. This feature is now in beta, so you can easily try it out. A restricted picklist field includes only the values that you've defined. Your picklist data stays clean, because users can't add erroneous or redundant values. This feature is available in both Lightning Experience and Salesforce Classic.

# Test-Drive Global Picklists More Easily (Pilot)

Global picklists just got more accessible! This pilot program has been expanded to let more of you try the feature. Global picklists let you efficiently reuse a single list of values for multiple custom picklist fields. Easily share picklists across objects by creating picklist fields based on the master list of values. Your picklist data stays clean because users can't add erroneous or redundant values through the API. This feature is available in Salesforce Classic only.

### Translate Global Picklists in Multiple Languages (Pilot)

After you create a global picklist in Setup, use the Translation Workbench to manage translations for any language that your org supports. Translation Workbench is available only for multi-language orgs. This feature is available in Salesforce Classic only.

# End of Support for JavaScript, iFrames, CSS, and Other Advanced Markup in Standard Messages & Alerts Home Page Components

We are now enforcing the ban on unsupported code in standard Messages & Alerts home page components. JavaScript, CSS, iframes, and other unsupported markup is now removed when you edit and save a Messages & Alerts home page component. Home page components are available in Salesforce Classic only.

# Formula Field Support in Lightning Experience

Formula fields with hyperlinks and images are now supported in Lightning Experience.

### Improved Bandwidth and Time Limit Enforcement for Force.com Sites

Don't frustrate customers with an unavailable Force.com site when your provisioned limits are hit. As of Spring '16, your site won't be automatically disabled when limits are hit, so long as the host instance has resources to serve the site. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.

# Customize the Navigation Experience for Lightning Experience Users

Before this release, everyone had the same navigation menu. Now you can create different menus and tailor the navigation experience for your various types of users, such as sales reps, sales managers, and execs. You can add, remove, and move items so that users can go to the places they use most often with a single click. This feature is available in Lightning Experience only.



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

### IN THIS SECTION:

### Create Lightning Experience Navigation Menus

Create navigation menus to give your users a shortcut to Salesforce features they use most. Have a sales navigation menu that prioritizes the items most applicable to your sales team. Put events, accounts, and organizations at the top. Create one for inside sales with leads, tasks, and contacts first. Give your execs a time-saving navigation menu that contains reports and dashboards at the top and remove the items they rarely use. Keep in mind that your users can always go to the App Launcher to get more objects and apps.

# Considerations for Custom Navigation Menus

Keep in mind these considerations when planning to create Lightning Experience custom navigation menus for your org.

# Create Lightning Experience Navigation Menus

Create navigation menus to give your users a shortcut to Salesforce features they use most. Have a sales navigation menu that prioritizes the items most applicable to your sales team. Put events, accounts, and organizations at the top. Create one for inside sales with leads, tasks, and contacts first. Give your execs a time-saving navigation menu that contains reports and dashboards at the top and remove the items they rarely use. Keep in mind that your users can always go to the App Launcher to get more objects and apps.

Most of the items that appear in the App Launcher can appear in a navigation menu.

- Your org's custom objects and apps
- Most standard objects

Even if the objects aren't supported in Lightning Experience yet, you can add many of them to navigation menus. When clicked, the objects open in Salesforce Classic in another tab.

- Visualforce tabs
- Lightning Component tabs
- Canvas apps via a Visualforce tab
- Web tabs

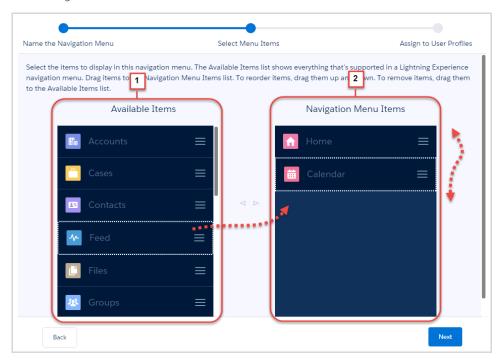


Note: You can't add connected apps like Gmail<sup>™</sup> and Microsoft Office 365<sup>™</sup> or Lightning Pages to navigation menus. Users access them from the App Launcher .....

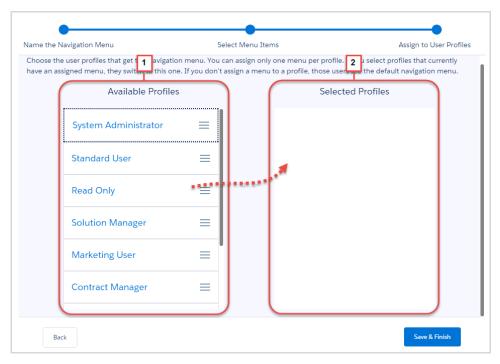
The Navigation Menu wizard walks you through the process of creating a custom menu. To start the wizard, from the Setup Quick Search box, enter Navigation Menus.

You start by naming the navigation menu.

The the wizard displays a list of all items that can appear on a navigation menu. Drag the items you want from the available list on the left (1) to the navigation menu list on the right (2). To reorder items on the menu, drag them up and down. To remove items, drag them back to the available list on the left. When you're done, the navigation menu items list on the right reflects the order in which they appear on the navigation menu.



Next, you select which of your org's user profiles (1) you want for this navigation menu (2).



That's it! You've created a custom navigation menu. Now, clone this one and use it as a template for the next navigation menu.

# **Considerations for Custom Navigation Menus**

Keep in mind these considerations when planning to create Lightning Experience custom navigation menus for your org.

# The Default Lightning Experience Navigation Menu Never Goes Away

Lightning Experience includes a default navigation menu that's assigned to all your users. This menu lists and orders items as in the Winter '16 release, and you can't edit it. If you remove a custom navigation menu from a user profile without replacing it with another one, the profile switches to the default menu. If you delete a custom navigation menu, all user profiles that were assigned to that menu revert to the default menu.

### You Assign Only One Navigation Menu to a User Profile

If you assign a navigation menu to a user profile that already has a menu assigned to it, the new menu overrides the previous one. Users belonging to that profile immediately see the new navigation menu. Keep that in mind as you create more navigation menus. If a user suddenly sees a different navigation menu, you could get calls from some confused users.

# You Can Assign a Navigation Menu to Multiple User Profiles

You tailor navigation menus for different types of users by assigning the menus to user profiles. You can assign a navigation menu to several user profiles. For example, you can assign an inside sales-centric navigation menu to all profiles involved with your inside sales teams.

# Your Edition Determines How Many Custom Navigation Menus You Can Assign

For all editions, except Professional Edition, you can assign up to 10 custom navigation menus. Professional Edition allows a total of five menus.

# **Navigation Menus Can List Up to 100 Items**

If a menu contains too many items, it becomes less useful. But you can list up to 100 items on a single navigation menu.

# Salesforce Apps with Multiple Tabs Are Appear as Separate Tabs in Navigation Menus

For apps that have multiple tabs (formerly called tab sets), each tab appears as a separate item on the available items list. Hunt through the list to find all the related tabs to keep them together on the navigation menu. Of course, you can take this opportunity to be selective. You don't have to list all the app's tabs on the menu.

# **Navigation Menus Respect User Permissions**

If a user doesn't have permission to access an object, it doesn't appear on the navigation menu.

# Navigation Menus Can Contain Objects Not Supported in Lightning Experience

Lightning Experience is a work in progress. More objects are becoming available with each release, but a few objects still aren't supported. Even if the objects aren't yet supported in Lightning Experience you can still add many of them to navigation menus. When clicked, the object opens in Salesforce Classic in another tab.

However, not all unsupported objects can appear on navigation menus. No worries—the wizard lists only available objects, so you don't have to keep track of them yourself. If you're curious, see Lightning Experience limitations for the latest list of unsupported objects.

# URL Custom Button and Link Support in Lightning Experience and Salesforce1

Custom buttons and links that define their content source as URL are now supported in Lightning Experience and the Salesforce1 mobile app. This feature was previously available in Salesforce Classic only.



Ø

**Note:** If you use URL custom buttons to pass parameters to standard pages in Salesforce Classic—such as pre-populating fields when creating a record—this behavior doesn't work in Salesforce1 or Lightning Experience.

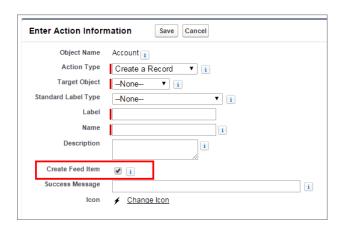
Custom buttons and links are available in: **All** Editions

# Select Whether a Quick Action Creates a Feed Item On Execution

We added a field to the Create a Record and Log a Call action types that gives you control over whether the action creates a feed item after it executes. You can now reduce clutter and noise on your feeds from unnecessary record creation or logged call posts. This option is selected by default. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile app.



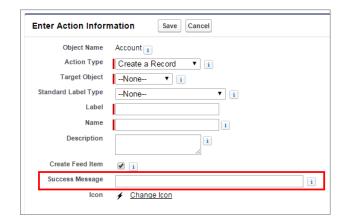
Available in: Group,
Professional, Enterprise,
Performance, Unlimited,
Contact Manager,
Database.com, and
Developer Editions



**Note**: If you have All Related Objects selected under feed tracking for a particular object, when a quick action creates related objects, a feed item is always created, regardless of the status of Create Feed Item.

# Create Custom Success Messages for Quick Actions

For Create a Record, Update a Record, and Log a Call action types, you can create a custom message that displays when the action executes successfully. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce 1 mobile app.



# **EDITIONS**

Available in: Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Database.com, and Developer Editions

# Custom List View Buttons No Longer Available in the Enhanced Page Layout Editor

Custom buttons configured as a List Button were incorrectly available as quick actions in the Salesforce1 Actions bucket in the palette of the enhanced page layout editor. You could even add them to the Salesforce1 and Lightning Experience Actions section of the layout, although they didn't display on record pages. This change prevents these list view buttons from appearing in the palette. Custom list view buttons that you previously added to page layouts no longer display in the page layout editor.



Custom buttons and links are available in: **All** Editions

# Delegate Admin Privileges to Select Users from Setup in Lightning Experience

You can now use Setup in Lightning Experience to assign limited admin privileges to users who aren't administrators. Delegating specific tasks to particular users allows you to focus on other work. For example, make the Customer Support team manager a delegated administrator to manage users in the Support Manager role and all subordinate roles. This feature is available in both Lightning Experience and Salesforce Classic.

# EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

### Search Salesforce Identity SETUP Create \* Delegated Administration Security Activations Help for this Page 🕜 Manage Delegated Groups Certificate and Key Manage. Below are delegated groups defined for your organization. You can choose to delegate user administration, Delegated Administration Ϋ́Ξ custom object administration, or both to the delegated administrators of this group. Expire All Passwords **Delegated Groups** New Field Accessibility Action Delegated Group Name Login Access Created By Modified By Edit Customer Support Admin User, 10/5/2015 11:19 AM Admin User, 11/16/2015 2:24 PM

# **Delegated Administration from Setup in Lightning Experience**

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

File Upload and Download S..

# Eliminate Picklist Clutter with Restricted Picklists (Beta)

Enforce the integrity of your picklist data with restricted picklists. This feature is now in beta, so you can easily try it out. A restricted picklist field includes only the values that you've defined. Your picklist data stays clean, because users can't add erroneous or redundant values. This feature is available in both Lightning Experience and Salesforce Classic.

Here's another reason to try restricted picklists: You can take advantage of them in custom metadata types. Custom metadata types are custom-defined types of application metadata that can be packaged and used along with an app. They save time by letting you define configurations and create reusable app components and features. Picklists on custom metadata types are always restricted, so enable restricted picklists to use custom metadata types.

# **EDITIONS**

Available in: Developer Edition and sandboxes by default, and All other editions with pilot participation.

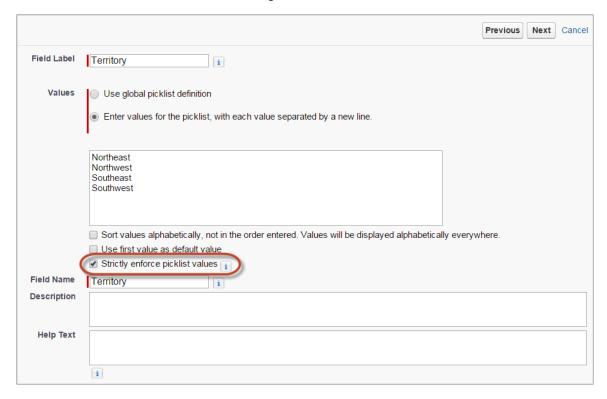


Note: If you have a Developer Edition org or sandbox org, no setup is required to use restricted picklists. You can package restricted picklists with an app only in Developer Edition or sandbox orgs.

For all other editions, restricted picklists are available as a beta feature, which means they're highly functional but have known limitations. Contact Salesforce to enable restricted picklists.

You define the list of values for a picklist when you create the custom picklist field. However, users can introduce other values by loading them through the API. To enable validation of picklist values against the defined list of values, select **Strictly enforce picklist values**. This prevents users from adding values through the API.

# **Defining a Restricted Picklist**



Only a new custom picklist field can be a restricted picklist. You can't convert an existing non-restricted picklist to a restricted picklist.

SEE ALSO:

Salesforce Help: Custom Metadata Types Salesforce Help: Picklist Limitations

# Test-Drive Global Picklists More Easily (Pilot)

Global picklists just got more accessible! This pilot program has been expanded to let more of you try the feature. Global picklists let you efficiently reuse a single list of values for multiple custom picklist fields. Easily share picklists across objects by creating picklist fields based on the master list of values. Your picklist data stays clean because users can't add erroneous or redundant values through the API. This feature is available in Salesforce Classic only.



**Note**: If you have a Developer Edition org or sandbox org, no setup is required. For all other editions, contact Salesforce to enable global picklists.

We provide global picklists 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. Global picklists 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. You can provide feedback and suggestions for global picklists in the Global, Restricted Custom Picklists group in the Salesforce Success Community.

# EDITIONS

Available in: **Developer**Edition and sandboxes by default, and **All** other editions with pilot participation.

A global picklist is a restricted picklist by definition. When you create a global picklist, the list of values you specify is protected. Only you can add or change values by editing the "master" picklist.

When you create a custom picklist and base it on the global picklist, its list of values is automatically populated and non-editable. Users can't load extraneous values to the global picklist or to picklist fields that are based on it through the API.

Create a global picklist from the Setup tree. Then create custom picklist fields the way you always have. But now you have the option of using a global picklist definition for as many custom picklists as you want.

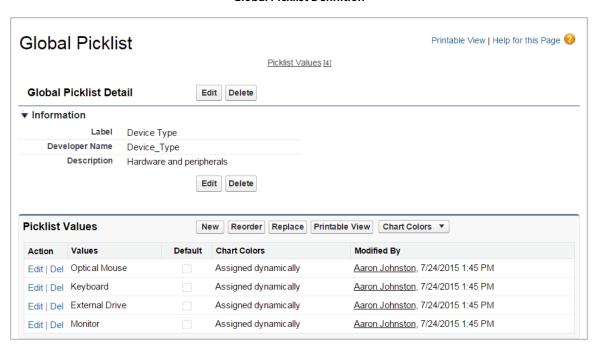
# App Setup Customize Create Apps Custom Labels Objects Picklists Packages Report Types Tabs Action Link Templates

### **New Picklists Node in Setup**

Create your global picklist and specify its values.

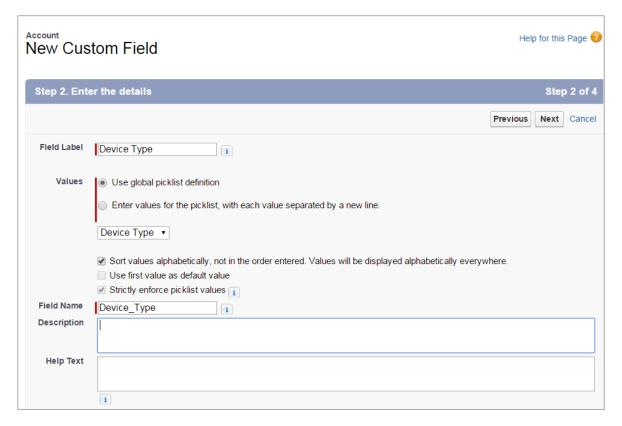
### **Global Picklist Definition**

Global ActionsWorkflow & Approvals



New picklists based on the global picklist inherit its values. When you edit the global picklist, the other picklists that use its values are also updated.

### New Picklist Based on a Global Picklist



# **Known Limitations for This Pilot**

- Global picklists can be packaged with an app only in Developer Edition and sandbox orgs.
- The list of inherited values doesn't appear on the detail page for a picklist that's based on a global picklist.
- For custom picklist fields based on a global picklist, you can't change the custom picklist from a single-select to a multi-select picklist.

# Translate Global Picklists in Multiple Languages (Pilot)

After you create a global picklist in Setup, use the Translation Workbench to manage translations for any language that your org supports. Translation Workbench is available only for multi-language orgs. This feature is available in Salesforce Classic only.



**Note:** If you have a Developer Edition org or sandbox org, no setup is required to get the global picklists feature. For all other editions, contact Salesforce to enable global picklists.

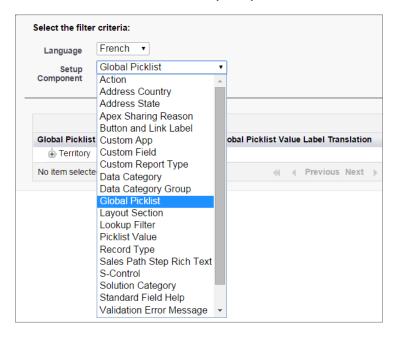
Create your global picklist from the Picklists node in Setup. Enter its values in your org's primary language. Then translate the picklist's values.

From Setup, enter translation in the Quick Find box, then select **Translate**. Select the language to translate to, then select **Global Picklist** as the Setup Component.

# EDITIONS

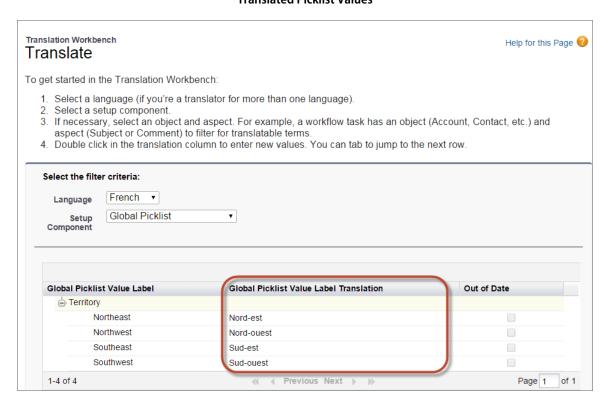
Available in: **Developer**Edition and sandboxes by default, and **All** other editions with pilot participation.

# **Global Picklists Setup Component**



Specify your translated values by double-clicking under Global Picklist Value Label Translation and entering the translations.

### **Translated Picklist Values**



SEE ALSO:

Salesforce Help: Adding and Editing Translated Languages and Translators

# End of Support for JavaScript, iFrames, CSS, and Other Advanced Markup in Standard Messages & Alerts Home Page Components

We are now enforcing the ban on unsupported code in standard Messages & Alerts home page components. JavaScript, CSS, iframes, and other unsupported markup is now removed when you edit and save a Messages & Alerts home page component. Home page components are available in Salesforce Classic only.



Available in all editions

In Summer '14, we replaced the rich text editor in HTML Area home page components and notified you that we would start removing unsupported code in Summer '15. This change to the Messages and Alerts home page component continues that work. (See "Home Page Components" in the Summer '14 release notes.)

At runtime, standard Messages & Alerts home page components that contain unsupported markup are dynamically stripped upon rendering.

# Formula Field Support in Lightning Experience

Formula fields with hyperlinks and images are now supported in Lightning Experience.

You can now click on an external hyperlink in a text formula field, which navigates to the link in another tab. Images added via a text formula field now display correctly in list views and related lists. Images in search results are not supported in Lightning Experience.

EDITIONS

Formulas are available in: **All** Editions

# Improved Bandwidth and Time Limit Enforcement for Force.com Sites

Don't frustrate customers with an unavailable Force.com site when your provisioned limits are hit. As of Spring '16, your site won't be automatically disabled when limits are hit, so long as the host instance has resources to serve the site. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile app.

Bandwidth and Service Request Time limits are tracked and enforced over a 24-hour period. Prior to Spring '16, when a site exceeded the provisioned limits over the 24-hour period, it was automatically disabled. We've updated this enforcement for Spring '16 to provide a better experience, for you and your customers.

EDITIONS

Available in: Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Database.com, and Developer Editions

Sites that exceed provisioned limits within the 24-hour period will not automatically be made unavailable if the host instance has resources to serve the site. However, note that even when a site is still available when the provisioned limits have been exceeded, there's no guarantee in service level.

You can always monitor your limits for page views, bandwidth, and time consumption under **Setup** > **Build** > **Develop** > **Sites**. Select a site, and you'll see related lists for page views for the current month's billing cycle, and the 24-hour bandwidth and service request time usage history.

See Force.com Sites Limits and Billingfor more information about site limits.

# Migrate to Lightning Experience like a Boss

Whether you're curious if Lightning Experience is right for your organization, or you're ready to make the leap, Migration Assistant is here to guide you each step of the way. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in all editions

Introducing the Migration Assistant: an enhanced version of the Lightning Experience Setup page. Migration Assistant provides more resources to help you learn about Lightning Experience and

evaluate whether it's right for your Salesforce organization. When you're ready, it also guides you through enabling key features and

setting up the right users. Migration Assistant introduces resources in the order you need them, keeping you organized and confident that you've covered all the details during rollout.

For example, the new Lightning Experience Preview feature lets you see what your org looks like in the new interface before you flip the switch. That way, you get to explore Lightning Experience without disrupting your sales reps' working in Salesforce Classic.

Because you're working from your live org, you can change settings and perms while in Preview mode, but be careful! You're working with your live data, so any changes you make are visible to your users.

To get started, from Setup, enter Lightning Experience in the Quick Find box, then select Lightning Experience.

SEE ALSO:

Lightning Experience: A New, Modern, Intelligent User Experience

# Lightning Experience Setup

Use Setup with more ease in Lightning Experience and save time. Lightning Experience expands your options for seamlessly interacting with data that's stored outside of your Salesforce organization. Lightning Experience also simplifies the user interface. This feature is available only in Lightning Experience.

### IN THIS SECTION:

# Setup: Right-Click to View in a New Tab or Window in Lightning Experience

Conveniently open a Setup node or a user's personal settings in a new tab or window by using your browser's right-click functionality. In Lightning Experience, this functionality works on all Setup nodes. It doesn't work on individual pages within Setup. This feature is available in both Lightning Experience and Salesforce Classic.

# Setup: Right-Click to View in a New Tab or Window in Lightning Experience

Conveniently open a Setup node or a user's personal settings in a new tab or window by using your browser's right-click functionality. In Lightning Experience, this functionality works on all Setup nodes. It doesn't work on individual pages within Setup. This feature is available in both Lightning Experience and Salesforce Classic.



**Note**: For the Schema Builder and Data Import nodes, the new tab or page is displayed with the Salesforce Classic user interface, regardless of which user interface you're using.

# Lightning App Builder

This release, we've expanded our pilot for editing record pages in Lightning Experience by allowing you to create record pages from scratch, and by allowing Lightning pages to override the View standard button. We've also added new picklist functionality. This feature is available in both Lightning Experience and Salesforce Classic.

### IN THIS SECTION:

### Deletion of Custom Lightning Experience Record Pages (Pilot)

In Winter '16, we warned you that pages created as part of the pilot to customize record pages

in Lightning Experience would revert to the default page experience. We're keeping that promise. In Spring '16, all custom Lightning Experience record pages that you created in the Lightning App Builder in Winter '16 will be deleted.

# EDITIONS

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

# Create Custom Tab Sets on Record Pages in Lightning Experience (Pilot)

Use the Tabs component to add a set of tabs to a region of your Lightning Page. Choose from a set of standard tabs or create custom tabs to enhance record pages for your Lightning Experience users. This feature is available in Lightning Experience only.

### Create Custom Lightning Experience Record Pages from Scratch in the Lightning App Builder (Pilot)

In Winter '16, the only way to create a record page in Lightning Experience was to clone it using Edit Page from the Setup menu. Now you can also create record pages from scratch via the New button on the Lightning App Builder list page. Select from various page templates to create an even more customized record page for your Lightning Experience users. This feature is available in both Lightning Experience and Salesforce Classic.

# Auto-Suggestion of Results in Lightning App Builder Drop-Down Menus

When searching for items in drop-down menus in the Lightning App Builder, you can now enter a few characters, and all available matches display as you type. This feature is available in both Lightning Experience and Salesforce Classic.

# Change in How the Recent Items Component's entityNames Values Are Listed

If you're a developer creating Lightning Pages in XML, this feature update is for you! Lightning component attributes that are complex values are now represented as JSON. The attributes are now handled as real data types, not just as strings. This feature is available in Salesforce1 and Lightning Experience.

# Deletion of Custom Lightning Experience Record Pages (Pilot)

In Winter '16, we warned you that pages created as part of the pilot to customize record pages in Lightning Experience would revert to the default page experience. We're keeping that promise. In Spring '16, all custom Lightning Experience record pages that you created in the Lightning App Builder in Winter '16 will be deleted.

The pilot for customizing record pages in Lightning Experience Developer orgs and sandbox orgs is continuing through Spring '16. Record pages that you create in Spring '16 are supported going forward.



Available in: **Developer** Edition

# Create Custom Tab Sets on Record Pages in Lightning Experience (Pilot)

Use the Tabs component to add a set of tabs to a region of your Lightning Page. Choose from a set of standard tabs or create custom tabs to enhance record pages for your Lightning Experience users. This feature is available in Lightning Experience only.

This feature is part of the pilot for creating and editing record pages with the Lightning App Builder.

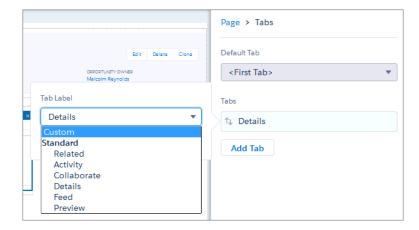


**Note:** Creating and editing Lightning Experience record pages using the Lightning App Builder is currently available to Developer Edition organizations through a pilot program. Pilot programs are subject to change, and as such, we cannot guarantee a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available.

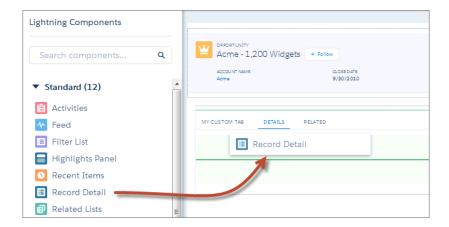


Available in: **Developer** Edition

After adding a Tabs component to your record page, you can add and customize the tabs in the component's properties pane. You can give your tabs a standard label or create a custom label by clicking **Custom** and then entering the tab name you want.



When you're ready to add components to a tab, select the tab on the canvas, and then drop a component directly below it.



# Create Custom Lightning Experience Record Pages from Scratch in the Lightning App Builder (Pilot)

In Winter '16, the only way to create a record page in Lightning Experience was to clone it using Edit Page from the Setup menu. Now you can also create record pages from scratch via the New button on the Lightning App Builder list page. Select from various page templates to create an even more customized record page for your Lightning Experience users. This feature is available in both Lightning Experience and Salesforce Classic.



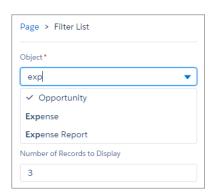
This feature is part of the pilot for creating and editing record pages with the Lightning App Builder.



**Note:** Creating and editing Lightning Experience record pages using the Lightning App Builder is currently available to Developer Edition organizations through a pilot program. Pilot programs are subject to change, and as such, we cannot guarantee a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available.

# Auto-Suggestion of Results in Lightning App Builder Drop-Down Menus

When searching for items in drop-down menus in the Lightning App Builder, you can now enter a few characters, and all available matches display as you type. This feature is available in both Lightning Experience and Salesforce Classic.





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

SEE ALSO:

Salesforce Help: Lightning Experience Record Pages in Lightning App Builder (Pilot) Lightning Experience: A New, Modern, Intelligent User Experience

# Change in How the Recent Items Component's entityNames Values Are Listed

If you're a developer creating Lightning Pages in XML, this feature update is for you! Lightning component attributes that are complex values are now represented as JSON. The attributes are now handled as real data types, not just as strings. This feature is available in Salesforce1 and Lightning Experience.

Of the standard components available for Lightning Pages, only the Recent Items component is affected by this change. The values of the Recent Items component property entityNames are now stored as JSON rather than a comma-separated list. So, in your Recent Items components, instead of listing objects like this Account, obj\_\_c in your page XML, you now need to list them like this ["Account, obj\_c"].



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



**Example**: Here's an annotated example of a Lightning Page (known as FlexiPage in the API) containing a Recent Items component that uses the new format:

```
<value>some ones</value>
           </componentInstanceProperties>
            <componentName>flexipage:filterListCard</componentName>
        </componentInstances>
   <!-- Recent Items component with single entity -->
        <componentInstances>
           <componentInstanceProperties>
               <name>entityNames</name>
                <value>["obj c"]</value> <!-- Now JSON, not commas -->
           </componentInstanceProperties>
           <componentInstanceProperties>
                <name>label</name>
                <value>Recent Items Tied to obj c</value>
           </componentInstanceProperties>
            <componentName>flexipage:recentItems</componentName>
        </componentInstances>
   <!-- Recent Items component with multiple entities -->
        <componentInstances>
           <componentInstanceProperties>
               <name>entityNames</name>
                <value>["obj c","Account"]</value> <!-- Now JSON, not commas -->
           </componentInstanceProperties>
           <componentInstanceProperties>
                <name>label</name>
                <value>Recent Items Tied to obj c</value>
           </componentInstanceProperties>
            <componentName>flexipage:recentItems</componentName>
        </componentInstances>
        <name>main</name>
        <type>Region</type>
   </flexiPageRegions>
   <masterLabel>
Lightning Page With Filter List And Recent Items Components
   </masterLabel>
   <pageTemplate>flexipage:defaultAppHomeTemplate/pageTemplate>
   <type>AppPage</type>
</FlexiPage>
```

# **Data Customization**

We've improved the Data Import Wizard and Data Loader to make it easier for you to integrate your data with Salesforce.

# IN THIS SECTION:

# **Data Import Wizard Enhancements**

We've updated the Data Import Wizard to make sure that your data import experience is seamless. This feature is available in both Lightning Experience and Salesforce Classic.

### Data Loader

We've released a new version of Data Loader! This feature is available in both Lightning Experience and Salesforce Classic.

# **Data Import Wizard Enhancements**

We've updated the Data Import Wizard to make sure that your data import experience is seamless. This feature is available in both Lightning Experience and Salesforce Classic.

### IN THIS SECTION:

### Import Person Accounts with the Data Import Wizard

To provide users with the best experience, Salesforce has begun retiring the individual import wizard for person accounts. The individual person account import wizard is no longer available in Setup. But don't worry! You'll be even more productive with the unified Data Import Wizard. This feature is available in both Lightning Experience and Salesforce Classic.

# Accessing the Data Import Wizard

You can now access the Data Import Wizard from the **Tools** list from the object-specific home page.

# Data Import Wizard Import Status

We've updated the Data Import Wizard user interface to show you important information about your data imports.

### Add and Update Campaign Members with the Data Import Wizard

You can now use the Data Import Wizard to add contacts, leads, and person accounts to campaigns. We've also updated the campaign detail page to launch the Data Import Wizard instead of the legacy campaign import wizard. This feature is available in both Lightning Experience and Salesforce Classic.

# User Permission for Importing Custom Objects

There's a new permission for your users to import custom objects.

# Data Import Wizard Respects More Field Accessibility Settings

The Data Import Wizard now respects Salesforce admins' field access as specified in page layouts and field-level security. Previously, those settings affected only non-admin users of Data Import Wizard. This feature is available in both Lightning Experience and Salesforce Classic.

# Import Person Accounts with the Data Import Wizard

To provide users with the best experience, Salesforce has begun retiring the individual import wizard for person accounts. The individual person account import wizard is no longer available in Setup. But don't worry! You'll be even more productive with the unified Data Import Wizard. This feature is available in both Lightning Experience and Salesforce Classic.

The individual person account import wizard opens in a separate pop-up window, while the Data Import Wizard combines all the functionality of the individual import wizard in a single browser. The Data Import Wizard provides a unified interface that lets you import a variety of objects from one wizard, rather than using each individual import wizard to import a specific object. The Data Import Wizard also improves the import process with progress tracking and helpful tips during data import workflow.

# **EDITIONS**

Available in: both Salesforce Classic and Lightning Experience

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

Starting in Spring '16, the individual person account import wizard remains accessible only from the Legacy Data Import Tools page until it's officially retired. From Setup, select **Data Management** > **Data Import Wizard**. On the Data Import Wizard home page, click **Legacy Data Import Tools**.

### IN THIS SECTION:

### Add Person Accounts with the Data Import Wizard

To add person accounts to your Salesforce org, launch the Data Import Wizard from the accounts home page.

# Add Person Accounts with the Data Import Wizard

# **USER PERMISSIONS**

To create person accounts that you own via the Data Import Wizard:

"Create" on accounts

**AND** 

"Edit" on accounts

AND

"Import Personal Contacts"

To create person accounts owned by others via the Data Import Wizard:

"Create" on accounts

AND

"Edit" on accounts and contacts

**AND** 

"Modify All Data"

To add person accounts to your Salesforce org, launch the Data Import Wizard from the accounts home page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- First Name
- Last Name
- Email
- Phone

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- 1. From the accounts home page, click **Import Data**.
- 2. Click Launch Wizard.

The Data Import Wizard appears.

- 3. Select Person Accounts, then select Add new and update existing records.
- 4. Set Match Account by to Email.
- 5. Select the CSV file that contains your import data, and click Next.
- **6.** Map column headers from your CSV file to these fields.
  - First Name
  - Last Name
  - Email
  - Phone
- 7. Click Next.
- 8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Accessing the Data Import Wizard

You can now access the Data Import Wizard from the **Tools** list from the object-specific home page.

The object-specific home pages where you can access the Data Import Wizard from the **Tools** list:

- Accounts
- Contacts
- Leads
- Custom Objects
- Person Accounts
- Knowledge Articles

# Data Import Wizard Import Status

We've updated the Data Import Wizard user interface to show you important information about your data imports.

We added a **Recent Import Jobs** chart on the Data Import Wizard home page that lists important metrics and statuses at glance.

# Add and Update Campaign Members with the Data Import Wizard

You can now use the Data Import Wizard to add contacts, leads, and person accounts to campaigns. We've also updated the campaign detail page to launch the Data Import Wizard instead of the legacy campaign import wizard. This feature is available in both Lightning Experience and Salesforce Classic.

Unlike the legacy campaign update wizard, the Data Import Wizard:

- Can create contacts and add them to campaigns in the same import
- Respects the user's field access as specified by page layouts and field-level security
- Requires more fields in the import file to ensure the data completeness of records in your Salesforce org
- Requires the campaign member IDs to update campaign member statuses
- Can add records of only one object at a time to a campaign

Because the Data Import Wizard behaves differently, review the instructions, confirm that your users have the required permissions, and educate your users as needed. For example, CSV files that worked with the legacy campaign update wizard don't always contain the fields that the Data Import Wizard requires.

### IN THIS SECTION:

### Update Campaign Member Statuses with the Data Import Wizard

To update the status of many campaign members at once, launch the Data Import Wizard from the campaign detail page.

### Add Existing Contacts to a Campaign with the Data Import Wizard

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

# Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

# Add Existing Person Accounts to a Campaign with the Data Import Wizard

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

# EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Create Contacts and Add Them to a Campaign with the Data Import Wizard

With a single import file, you can create multiple contacts at once and make them members of a campaign.

Create Leads and Add Them to a Campaign with the Data Import Wizard

With a single import file, you can create multiple leads at once and make them members of a campaign.

# Update Campaign Member Statuses with the Data Import Wizard

To update the status of many campaign members at once, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these campaign member fields.

- Salesforce ID of the campaign member
- Status of the campaign member
- 1 Tip: To obtain Salesforce IDs or other values from your org, run reports and then export the report data.
- From the campaign detail page, select Manage Members > Update Members Import File.
   The Data Import Wizard appears.
- 2. Select Campaign Member Status, then select Update existing records.
- 3. Select the CSV file that contains your import data, and click **Next**.
- **4.** Map column headers from your CSV file to these campaign member fields.
  - Salesforce ID of the campaign member
  - Status of the campaign member
- 5. Click Next.
- **6.** Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Add Existing Contacts to a Campaign with the Data Import Wizard

# USER PERMISSIONS

To add contacts that you own to a campaign via the Data Import Wizard:

 ${\tt Marketing\ User\ } \textbf{\textit{Selected in your user information}$ 

**AND** 

"Create" on accounts

**AND** 

"Read" on contacts

**AND** 

"Edit" on accounts and campaigns

AND

"Import Personal Contacts"

# **USER PERMISSIONS**

To update campaign member statuses via the Data Import Wizard:

 Marketing User selected in your user information

AND

"Read" on contacts OR "Import Leads"

AND

"Edit" on campaigns

To add contacts owned by others to a campaign via the Data Marketing User selected in your user information Import Wizard:

AND

"Create" on accounts

AND

"Read" on contacts

AND

"Edit" on accounts, contacts, and campaigns

AND

"Modify All Data"

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Salesforce ID
- Contact: Salesforce ID
- Contact: Last Name
- Tip: To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- 1. From the campaign detail page, select Manage Members > Add Members Import File. The Data Import Wizard appears.
- 2. Select Accounts and Contacts, then select Update existing records.
- 3. Set Match Contact by to Salesforce.com ID.
- 4. Set Match Account by to Salesforce.com ID.
- 5. Select the CSV file that contains your import data, and click **Next**.
- **6.** Select Assign contacts to campaigns.
- **7.** Map column headers from your CSV file to these fields.
  - Account: Salesforce ID
  - Contact: Salesforce ID
  - Contact: Last Name
- 8. Click Next.
- 9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these

- Salesforce ID of the lead
- Last Name of the lead



Tip: To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- 1. From the campaign detail page, select Manage Members > Add Members Import File. The Data Import Wizard appears.
- 2. Select Leads, then select Update existing records.
- 3. Set Match Lead by to Salesforce.com ID.
- 4. Select Assign leads to campaigns.
- 5. Select the CSV file that contains your import data, and click **Next**.
- **6.** Map column headers from your CSV file to these fields.
  - Salesforce ID of the lead
  - Last Name of the lead
- 7. Click Next.
- 8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Add Existing Person Accounts to a Campaign with the Data Import Wizard

# **USER PERMISSIONS**

To add person accounts that you own to a campaign via the "Create" on accounts Data Import Wizard:

AND

"Edit" on accounts

AND

"Import Personal Contacts"

To add person accounts owned by others to a campaign via "Create" on accounts the Data Import Wizard:

AND

"Edit" on accounts and contacts

AND

"Modify All Data"

# **USER PERMISSIONS**

To add existing leads to a campaign via the Data Import Wizard:

Marketing User selected in your user information

AND

"Edit" on campaigns

AND

"Import Leads"

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact associated with the person account
- Email



Tip: To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- 1. From the campaign detail page, select Manage Members > Add Members Import File. The Data Import Wizard appears.
- 2. Select Person Accounts, then select Update existing records.
  - Note: Even though the Add new and update existing records option appears, you can't use it to add new person accounts to campaigns.
- 3. Set Match Account by to Email.
- 4. Select Assign person accounts to campaigns.
- 5. Select the CSV file that contains your import data, and click **Next**.
- **6.** Map column headers from your CSV file to these fields.
  - Salesforce ID of the contact associated with the person account
  - Email
- 7. Click Next.
- **8.** Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Create Contacts and Add Them to a Campaign with the Data Import Wizard

# **USER PERMISSIONS**

To create contacts that you own and add them to a campo	Marketing User selected in your user information
via the Data Import Wizard:	AND
	"Create" on accounts
	AND
	"Read" on contacts
	AND
	"Edit" on accounts and campaigns
	AND
	"Import Personal Contacts"
To create contacts owned by others and add them to a	Marketing User selected in your user information
campaign via the Data Import Wizard:	AND
	"Create" on accounts

AND

"Read" on contacts

AND

"Edit" on accounts, contacts, and campaigns

AND

"Modify All Data"

With a single import file, you can create multiple contacts at once and make them members of a campaign.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Account Name
- Contact: Email
- Contact: Last Name
- Contact: First Name (optional but recommended)
- 1 Tip: To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- From the campaign detail page, select Manage Members > Add Members Import File.
   The Data Import Wizard appears.
- 2. Select Accounts and Contacts, then select Add new and update existing records.
- 3. Set Match Contact by to Email.
- 4. Set Match Account by to Account Name and Account Site.
- 5. Select Assign contacts to campaigns.
- **6.** Select the CSV file that contains your import data, and click **Next**.
- 7. Map column headers from your CSV file to these fields.
  - Account: Account Name
  - Contact: Email
  - Contact: Last Name
  - Contact: First Name (optional but recommended)
- 8. Click Next.
- 9. Review the import settings, and then click Start Import.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# Create Leads and Add Them to a Campaign with the Data Import Wizard

With a single import file, you can create multiple leads at once and make them members of a campaign.

Before you begin, make sure that your import file is in CSV format and contains values for these lead fields.

- Email
- Company
- Last Name
- First Name (optional but recommended)
- ? Tip: To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

- From the campaign detail page, select Manage Members > Add Members Import File.
   The Data Import Wizard appears.
- 2. Select Leads, then select Add new and update existing records.
- 3. Set Match Lead by to Email.
- 4. Select Assign leads to campaigns.
- **5.** Select the CSV file that contains your import data, and click **Next**.
- **6.** Map column headers from your CSV file to these fields.
  - Email
  - Company
  - Last Name
  - First Name (optional but recommended)
- 7. Click Next.
- 8. Review the import settings, and then click Start Import.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

# User Permission for Importing Custom Objects

There's a new permission for your users to import custom objects.

# **USER PERMISSIONS**

To create leads and add them to a campaign via the Data Import Wizard:

 Marketing User selected in your user information

AND

"Edit" on campaigns

AND

"Import Leads"

# **USER PERMISSIONS**

To import custom objects:

"Import Custom Objects"

## Data Import Wizard Respects More Field Accessibility Settings

The Data Import Wizard now respects Salesforce admins' field access as specified in page layouts and field-level security. Previously, those settings affected only non-admin users of Data Import Wizard. This feature is available in both Lightning Experience and Salesforce Classic.

If you can't import field values that you've successfully imported in the past, check these settings.

- In your assigned profiles, check that your page layout assignments and field-level security settings allow you to see and edit the fields.
- In your assigned permission sets, check that the field permissions allow you to read and edit the fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

User permissions, such as "Edit Read Only Fields," also affect whether you can import field values, but that behavior hasn't changed in this release.

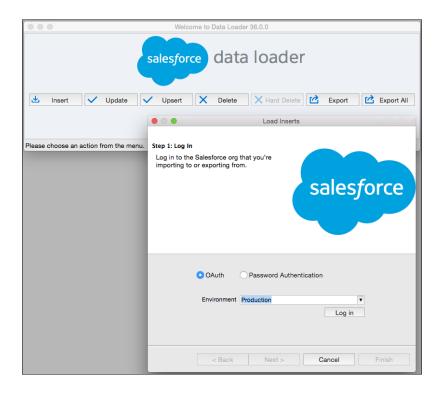
#### SEE ALSO:

Salesforce Help: Page Layouts and Field-Level Security
Salesforce Help: What permissions do I need to import records?

## Data Loader

We've released a new version of Data Loader! This feature is available in both Lightning Experience and Salesforce Classic.

The new version of Data Loader now supports Web Server OAuth Authentication for both Windows and Mac, which provides an extra layer of security compliance.



Also the Data Loader for Windows installer now includes the log-conf.xml file. The log-conf.xml is located at %LOCALAPPDATA%\salesforce.com\Data Loader\samples\conf\log-conf.xml for the current user, and

C:\Program Files (x86)\salesforce.com\Data Loader\samples\conf\log-conf.xml for all users. The log-conf.xml lets you implement enhanced logging.



**Note**: Salesforce no longer bundles Java with the Data Loader for Windows installer. Download and install Java on your Windows computer.

We recommend that you set the JAVA\_HOME environment variable to the directory where the Java Runtime Environment (JRE) is installed. Doing so ensures that you can run Data Loader in batch mode from the command line.

## System Requirements for Windows

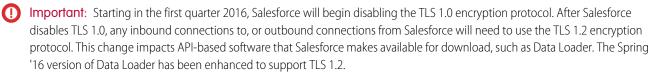
To use Data Loader for Windows, you need:

- Microsoft<sup>®</sup> Windows<sup>®</sup> 7 or Windows XP
- 120 MB of free disk space
- 256 MB of available memory
- Java JRE 1.8 (32-bit)

## System Requirements for Mac OS

To use Data Loader for Mac, you need:

- Mac® OS X
- 120 MB of free disk space
- 256 MB of available memory
- Java JRE 1.8
- Administrator privileges on the machine



To maintain access to Data Loader, you must upgrade to the Spring '16 version of Data Loader and Java JRE 1.8. We recommend that you begin planning to support TLS 1.2 as soon as possible.

# **Lightning Connect**

Lightning Connect has been renamed to Salesforce Connect. The Salesforce user interface and documentation will be updated to use the new feature name in Summer '16. Lightning Connect expands your options for seamlessly interacting with data that's stored outside your Salesforce organization.

## IN THIS SECTION:

#### Enable Writable External Objects with External Systems That Require CSRF Protection

Some external systems require Cross-Site Request Forgery (CSRF) protection with each request to create, edit, or delete their data. The OData 2.0 and 4.0 adapters for Lightning Connect now support anti-CSRF tokens and cookies so that those external systems can support writable external objects. Previously, Salesforce orgs could only read—and not write to—the data on those external systems. This feature is available in both Lightning Experience and Salesforce Classic.

## Access Encrypted Data Via Lightning Connect

When you link two Salesforce organizations together with Lightning Connect, the subscriber org's users can now access data that's encrypted at rest on the provider org and view that data in plaintext.

## Enable Writable External Objects with External Systems That Require CSRF Protection

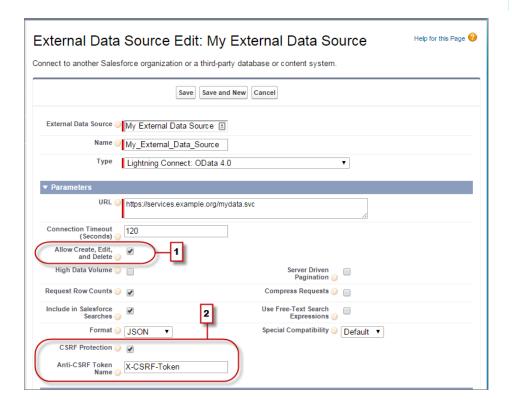
Some external systems require Cross-Site Request Forgery (CSRF) protection with each request to create, edit, or delete their data. The OData 2.0 and 4.0 adapters for Lightning Connect now support anti-CSRF tokens and cookies so that those external systems can support writable external objects. Previously, Salesforce orgs could only read—and not write to—the data on those external systems. This feature is available in both Lightning Experience and Salesforce Classic.

When you create or edit an OData 2.0 or 4.0 external data source with writable external objects (1), you can enable CSRF protection (2). If you do so, your org obtains an anti-CSRF token and cookie from the external system and includes them in each create, edit, and delete request.



Available in: **Developer** Edition

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



#### SEE ALSO:

Salesforce Help: Define an External Data Source for Lightning Connect—OData 2.0 or 4.0 Adapter Salesforce Help: CSRF Considerations for Lightning Connect—OData 2.0 and 4.0 Adapters

# Access Encrypted Data Via Lightning Connect

When you link two Salesforce organizations together with Lightning Connect, the subscriber org's users can now access data that's encrypted at rest on the provider org and view that data in plaintext.

A user's access to encrypted data on the subscriber org is determined by the credentials Lightning Connect uses to connect that user to the provider org. Which credentials are used is determined by the identity type of the external data source definition on the subscriber org.

Those credentials are associated with a specific user on the provider org. If that user on the provider org has the "View Encrypted Data" permission, users on the subscriber org who are connected with those credentials can view encrypted data on the provider org.

For example, suppose the Salesforce admin for the provider org has encrypted the Account Name field.

- If the subscriber org user is connected via Lightning Connect as a provider org user with the "View Encrypted Data" permission, they see the Account Name field contents as plaintext.
- If the subscriber org user is connected via Lightning Connect as a provider org user without the "View Encrypted Data" permission, the Account Name field contents are masked (that is, the values are replaced with asterisks).

SEE ALSO:

Salesforce Help: Platform Encryption

## **Process Builder**

We've made it easier to create and modify your processes. You can now reorder criteria and action groups, automatically use existing names and descriptions when you clone a version of a process, view field names at a glance, and insert mentions directly into messages in Post to Chatter actions. This feature is available in both Lightning Experience and Salesforce Classic.

# EDITIONS

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

## IN THIS SECTION:

## Easily Reorder Criteria in Your Process with Drag and Drop

Save time and clicks by quickly changing the order of criteria and action groups in your process. Just drag and drop—it's that easy. Previously, to change the order, you had to delete and redefine criteria and actions.

## Reuse Names and Descriptions When Creating a New Process Version

Tired of retyping names and descriptions for new versions of your process? That's over. New versions use the name and description from the original version. You can edit the name and description or leave it as is.

## View Field Names in Your Process at a Glance

Due to limited space, you can rarely see an entire field name. Now you can see what's being evaluated or updated at a glance. Just hover over the field name in the criteria or action side panel to see the entire name.

## Easier Mentions in Post to Chatter Actions

We've simplified the way you mention users or groups in Post to Chatter actions. Instead of inserting mentions with a separate field, just use the @ symbol to add mentions directly to the message.

## Update ID Fields Using Formulas

When your process updates an ID field, like an Owner ID, you can now use formulas.

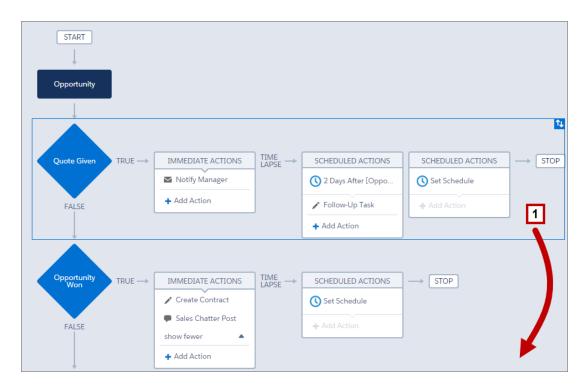
#### Send Email Alerts for Tasks and Events

You can now create email alerts for activities (tasks and events). Once you create an email alert, you can add it to a process, workflow rule, milestone, approval process, or flow.

# Easily Reorder Criteria in Your Process with Drag and Drop

Save time and clicks by quickly changing the order of criteria and action groups in your process. Just drag and drop—it's that easy. Previously, to change the order, you had to delete and redefine criteria and actions.

Criteria are evaluated in the order shown on the canvas. When criteria are true, the process executes the associated action group and stops evaluating additional criteria. When criteria are false, the process skips the action group and evaluates the criteria for the next action group.

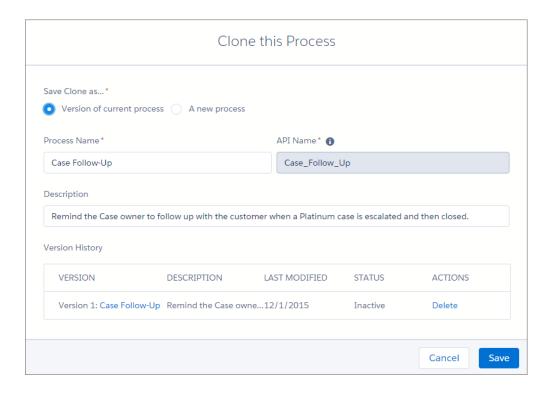


It's easy to reorder your criteria. Let's say you change some criteria to always execute the associated actions. This means that no subsequent criteria in your process will be evaluated. In this case, it's a good idea to change the order so that the criteria that always executes actions is at the end of your process. Just click the criteria node and action group (1) and move it to the new location at the end of your process.

# Reuse Names and Descriptions When Creating a New Process Version

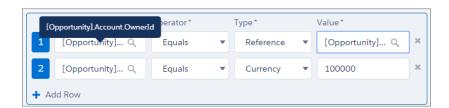
Tired of retyping names and descriptions for new versions of your process? That's over. New versions use the name and description from the original version. You can edit the name and description or leave it as is.

Cloned processes are assigned a version number, so you don't need to worry about keeping track of different versions. You can't change the API name when you create a new version of a process. API names are forever.



## View Field Names in Your Process at a Glance

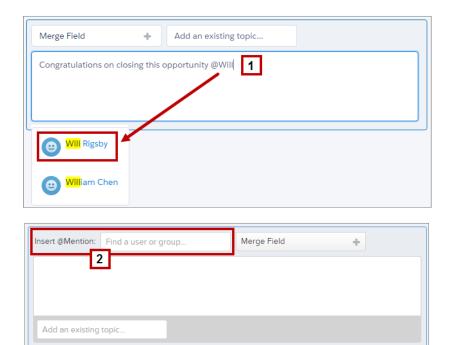
Due to limited space, you can rarely see an entire field name. Now you can see what's being evaluated or updated at a glance. Just hover over the field name in the criteria or action side panel to see the entire name.



## Easier Mentions in Post to Chatter Actions

We've simplified the way you mention users or groups in Post to Chatter actions. Instead of inserting mentions with a separate field, just use the @ symbol to add mentions directly to the message.

For example, type <code>@Will</code> in the message and then select the matching result (1).

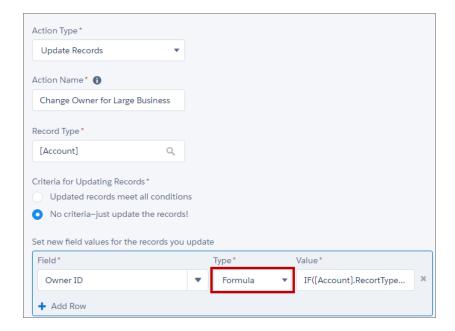


Previously, you inserted mentions into a message using the **Insert @Mention** field (2). Now you can add mentions directly into the message area.

# Update ID Fields Using Formulas

When your process updates an ID field, like an Owner ID, you can now use formulas.

You can already use formulas when your process updates fields, but previously you couldn't update ID fields using formulas. Now you can! For example, use a formula to change the Owner ID field on an account when the account is a large business.



## Send Email Alerts for Tasks and Events

You can now create email alerts for activities (tasks and events). Once you create an email alert, you can add it to a process, workflow rule, milestone, approval process, or flow.

# Sharing

Sharing improves your control over who sees what. This feature is available in both Lightning Experience and Salesforce Classic.

#### IN THIS SECTION:

## Optimized Parallel Sharing Rule Recalculation

Parallel sharing rule recalculation helps larger organizations to speed up sharing recalculation of each object asynchronously.

## EDITIONS

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

# Optimized Parallel Sharing Rule Recalculation

Parallel sharing rule recalculation helps larger organizations to speed up sharing recalculation of each object asynchronously.

If the number of impacted records from an owner-based sharing rule insert or update is less than 25,000, recalculation runs synchronously and you won't receive an email notification when it's completed. Owner-based sharing rule inserts and updates impacting less than 25,000 records are not available on the Background Jobs page.

You can monitor the progress of your parallel recalculation on the Background Jobs page or view your recent sharing operations on the View Setup Audit Trail page. To view your recalculation jobs, from Setup, enter *Background Jobs* in the Quick Find box, then select **Background Jobs**.

# Monitoring

Keep tabs on your organization's security using one of Salesforce's many monitoring tools.

## IN THIS SECTION:

Prevent Identity Fraud with Login Forensics (Generally Available)

Login forensics helps admins better determine which user behavior is legitimate to prevent identity fraud in Salesforce.

Analyze Event Monitoring Data with the Admin Analytics App (Pilot)

Wave Analytics for event monitoring provides an out-of-the-box analytics app for event log file and setup audit trail data.

# Prevent Identity Fraud with Login Forensics (Generally Available)

Login forensics helps admins better determine which user behavior is legitimate to prevent identity fraud in Salesforce.

Given the number of logins to an org on a daily—even hourly—basis, security practitioners can find it tough to determine if a specific user account is compromised.

Login forensics helps you identify suspicious login activity. It provides you key user access data, including:



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

- The average number of logins per user per a specified time period
- Who logged in more than the average number of times
- Who logged in during non-business hours
- Who logged in using suspicious IP ranges



Note: Login forensics isn't available on government pods.

# Analyze Event Monitoring Data with the Admin Analytics App (Pilot)

Wave Analytics for event monitoring provides an out-of-the-box analytics app for event log file and setup audit trail data.

EDITIONS

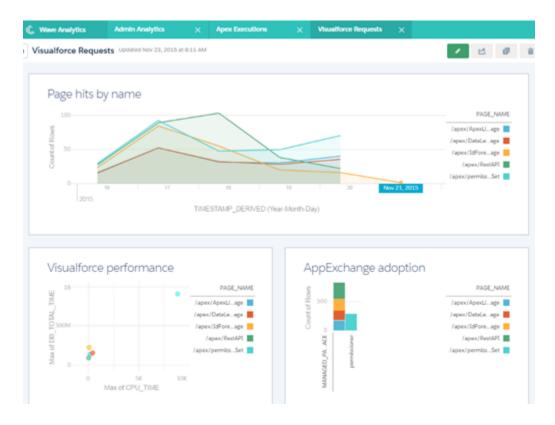
Built on top of the powerful Salesforce Wave Analytics platform, the Admin Analytics app gives your business analysts at-a-glance insights into your monitoring data. Setting up the app is easy, and your data loads automatically from Salesforce.

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



**Note**: The Admin Analytics app is available to select customers through a pilot program. For information on joining the pilot program, contact your Salesforce account executive.

The app comes with prebuilt dashboards for desktop and mobile devices. Each dashboard includes a set of charts that display useful information about different types of transactions or events that occurred in your org. You can even drill in to this data by user profiles and roles. Take a look at this sample Visualforce Requests dashboard.



You can see everything from which Visualforce pages your users are accessing to the performance of those pages. Whether you're monitoring users, performance, or adoption, the Admin Analytics app is a powerful addition to your toolbelt.

# Security and Identity: Better Authentication, Flexible Transaction Policies, More Encryption Coverage

We've improved two-factor authentication and added verification history. You can create your own authentication provider plugin. Your transaction policies can now use external web services, so you don't have to write a lot of policy-specific code. And Platform Encryption is now available to protect data in Communities.

#### IN THIS SECTION:

## Authentication and Identity

Use the new and improved Salesforce Authenticator to verify your users' identity from any location. Also, you can track identity verification activity, use new identity verification Apex methods in your custom apps, and apply two-factor authentication at a more granular level.

## Platform Encryption

Communities users can now read and work with data in encrypted fields. You can encrypt incoming and outgoing email attachments, and more.

## Transaction Security Policies Address Security Issues

Transaction Security is a framework that intercepts real-time Salesforce events and applies appropriate actions and notifications based on security policies you create. Transaction Security monitors events according to the policies that you set up. These policies are applied against events in your org and specify actions to take when certain event combinations occur. When a policy is triggered, you can have an action taken and receive an optional notification. This feature is available in both Lightning Experience and Salesforce Classic.

## Platform Security

You can use the new Health Check tool to identify and fix security risks in your password, session, and network access settings, all at a glance.

# Authentication and Identity

Use the new and improved Salesforce Authenticator to verify your users' identity from any location. Also, you can track identity verification activity, use new identity verification Apex methods in your custom apps, and apply two-factor authentication at a more granular level.

## IN THIS SECTION:

#### Identity Verification Method Added for Two-Factor Authentication

We made it easier for your users to verify their identity in Salesforce. The redesigned Salesforce Authenticator mobile app alerts users of logins and other account activities that require identity verification. Users verify the activity by responding on their mobile device. Salesforce Authenticator works for both Lightning Experience and Salesforce Classic.

## Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users

If your org has SAML single sign-on or social sign-on through an authentication provider enabled, we've simplified the process of requiring two-factor authentication at login. You can now use profile policies and session settings to require users in these orgs to complete two-factor authentication when they log in. Previously, you had to create a custom login flow. This feature is available in both Lightning Experience and Salesforce Classic.

## New Profile Policy for Session Security Level at Login

We've added a Session security level required at login setting for profiles. By default, the setting has a value of None for all profiles. You can change the setting to High Assurance to require that users assigned to the profile log in with two-factor authentication. This feature is available in both Lightning Experience and Salesforce Classic.

## Session Timeout Name Changed in Profile Settings

We've changed the name of the Session Timeout setting that controls how many minutes or hours of inactivity elapse before a session expires for users of a profile. On the profile overview page, in the Session Settings area, the setting is now called Session times out after. This feature is available in both Lightning Experience and Salesforce Classic.

#### Control Session Security Level for Device Activation

A new value in Session Security Levels, Device Activation, gives you more control over how and when your users are prompted to verify their identity. This feature is available in both Lightning Experience and Salesforce Classic.

## Track User Identity Verifications

As an administrator, you can now monitor and audit the past six months of your users' identity verification activity. For example, suppose that two-factor authentication is enabled when a user logs in, and the user provides a valid time-based one-time password as proof of identity. That information is recorded in Identity Verification History. This feature is available in both Lightning Experience and Salesforce Classic.

## Implement Identity Verification in Your Custom Solution with Apex

A new Apex method, Auth.SessionManagement.generateVerificationUrl, invokes an identity verification flow in your custom solution. For example, if you have a custom Visualforce page that displays sensitive account details, you can challenge the user to verify identity before viewing it. This feature is available in both Lightning Experience and Salesforce Classic.

## Improved Security for Identity Verification

Since an IP address isn't a reliable indicator of a user's identity, we've changed our risk-based authentication protocol. When your users log in to Salesforce from a device or browser we don't recognize, they are now prompted to verify identity, even if they log in from an IP address we've seen before.

## Improved Security for High-Assurance Resource Access Using APIs

If your org has a policy to require a high-assurance session to access connected apps, reports, or dashboards, you can't access them in a standard-assurance session using the Analytics or SOAP APIs. When using the Analytics API, if you try to access a resource that requires a high-assurance session, you receive an error message. This feature is available in both Lightning Experience and Salesforce Classic.

## New Special Character Assistance When Changing Passwords

When your users change a password that requires a special character, they now see a tooltip. The tooltip lists the characters that are allowed (!#\$%-\_=+<>). Previously, special characters were described only in Salesforce Help. This feature is available in both Lightning Experience and Salesforce Classic.

## New Time Values for Connected App Mobile App Settings

You can now allow a mobile-connected app that requires PIN protection to be idle longer before it locks and requires the PIN. Previously, the values for the Require PIN after setting were none (no locking), 1, 5, 10, and 30 minutes. We've added values of 60, 120, 180, and 240 minutes. This feature is available in both Lightning Experience and Salesforce Classic.

## External Identity Users Can Work with Accounts, Person Accounts, Assets, and Contacts

Users with an External Identity license can now read and edit accounts. They can also read, create, and edit assets and contacts. Previously, they couldn't access these objects. If person accounts are enabled in your org, the expanded access lets your external identity users work with person accounts. This feature is available in Salesforce Classic only.

## Create a Custom Authentication Provider Plug-in with Apex

You can create your own external auth provider if you don't see your preferred provider on our list. The custom authentication provider plug-in allows you to create your own single sign-on (SSO) auth provider. Admins and users can continue using the SSO credentials they already use for non-Salesforce applications with your Salesforce orgs. This feature is available in both Lightning Experience and Salesforce Classic.

## Username Added to Identity Verification Email Message

We've added the username to the email that your users receive when they log in to Salesforce from a device we don't recognize. The Subject of the email message is "Verify your identity in Salesforce."

**EDITIONS** 

Available in: Contact

Performance, Unlimited,

and **Developer** Editions

Manager, Group, Professional, Enterprise,

## Identity Verification Method Added for Two-Factor Authentication

We made it easier for your users to verify their identity in Salesforce. The redesigned Salesforce Authenticator mobile app alerts users of logins and other account activities that require identity verification. Users verify the activity by responding on their mobile device. Salesforce Authenticator works for both Lightning Experience and Salesforce Classic.

When users enable location services for the app, they can verify activities automatically from trusted locations, like a home or office. Salesforce Authenticator still generates verification codes, or time-based one-time passwords (TOTPs), as a method of identity verification.

Salesforce Authenticator is a free mobile app your users download from the App Store for iOS or

Google Play for Android. They can connect the app to their Salesforce account on the Advanced User Details page of their personal settings. Or, if you set a two-factor authentication requirement in your org, users who don't already use a mobile authenticator app are prompted to connect the account during login.

After they connect the app to their account, they use it whenever we have to verify their identity, such as when they log in from a device we don't recognize. They also use the app whenever your org policies require users to use two-factor authentication for logging in, accessing reports or dashboards, or accessing connected apps.

If a user loses access to the app, such as when replacing or losing a mobile device, disconnect the app from the user's account. Then the user can connect a new installation of the app on a different mobile device. You can disconnect the app from the account on that user's Advanced User Detail page.

For device activation and two-factor authentication, users who have the app connected to their account are first challenged to verify their identity using the app. If other identity verification methods, such as a code generated by an authenticator app or sent via SMS to the user's verified mobile phone, are available, users can sometimes choose another method.



Note: This feature will be available following the completion of the Spring '16 Salesforce release to all production orgs on February 13, 2016. It isn't available for preview and testing in sandbox orgs beforehand. Because of the App Store and Google Play release processes, it's possible that version 2.0 of the Salesforce Authenticator mobile app could be available for download before the new verification method is available in sandbox and production orgs. Users who download the new version of the app can't use version 2.0 functionality in Salesforce until the new verification method is released. When the new verification method is released, it is available for all orgs. To disable the feature for your org, contact Salesforce.

#### SEE ALSO:

Salesforce Authenticator Mobile App, Version 2.0, for Two-Factor Authentication

Salesforce Help: Connect Salesforce Authenticator (Version 2.0 or Later) to Your Account for Identity Verification

Salesforce Help: Salesforce Authenticator

# Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users

If your org has SAML single sign-on or social sign-on through an authentication provider enabled, we've simplified the process of requiring two-factor authentication at login. You can now use profile policies and session settings to require users in these orgs to complete two-factor authentication when they log in. Previously, you had to create a custom login flow. This feature is available in both Lightning Experience and Salesforce Classic.



Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions All Salesforce user interface authentication methods, including username and password, delegated authentication, SAML single sign-on, and social sign-on through a third-party authentication provider, are supported. You can apply the two-factor authentication requirement to users in Salesforce orgs and communities.

To require two-factor authentication for users assigned to a particular profile, edit the Session security level required at login profile setting. Then set session security levels in your org's session settings to apply the policy for particular login methods.

By default, the session security requirement at login for all profiles is None. You can edit a profile's Session Settings to change the requirement to High Assurance. When profile users with this requirement log in with a login method (such as username and password) that grants standard level security instead of high assurance, they're prompted to verify their identity with two-factor authentication. After users authenticate successfully, they're logged in to Salesforce.

You can edit the security level assigned to a login method in your org's Session Settings.

Users with mobile devices can use the Salesforce Authenticator mobile app or another authenticator app for two-factor authentication. Internal users can connect the app to their account in the Advanced User Details page of their personal settings. If you set the High Assurance requirement on a profile, profile users who don't already have Salesforce Authenticator or another authenticator app connected to their account are prompted to connect the app before logging in. After they connect the app, they're prompted to use the app to verify their identity.

Community members with the High Assurance profile requirement are prompted to connect an authenticator app during login.



Example: You've configured Facebook and LinkedIn as authentication providers in your org. Many of your users use "social sign-on" to log in using the username and password for their Facebook or LinkedIn accounts. You want to increase security by requiring users with the Standard User profile to use two-factor authentication when they log in with their Facebook account, but not with their LinkedIn account. You edit the Standard User profile and set the Session security level required at login to High Assurance. In your org's Session Settings, you edit the Session Security Levels. You place Facebook in the Standard column. In the High Assurance column, you place Two-Factor Authentication. You also place Device Activation in the High Assurance column, so Standard User profile users who activate a device at login aren't challenged to verify their identity a second time. Finally, you place LinkedIn in the High Assurance column, too.



Note: You can also use login flows to change the user's session security level to initiate identity verification under specific conditions. Login flows let you build a custom post-authentication process that meets your business requirements.

#### SEE ALSO:

New Profile Policy for Session Security Level at Login Control Session Security Level for Device Activation Salesforce Help: Set Two-Factor Authentication Login Requirements for Single Sign-On, Social Sign-On, and Communities New Profile Policy for Session Security Level at Login Control Session Security Level for Device Activation

# New Profile Policy for Session Security Level at Login

We've added a Session security level required at login setting for profiles. By default, the setting has a value of None for all profiles. You can change the setting to High Assurance to require that users assigned to the profile log in with two-factor authentication. This feature is available in both Lightning Experience and Salesforce Classic.

Apply the policy for SAML single sign-on, social sign-on with an authentication provider, or login with another authentication method.

## **EDITIONS**

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

To find the new setting, from Setup, enter *Profiles* in the Quick Find box, then select **Profiles**. Select a profile and scroll to Session Settings to view or edit the Session security level required at login setting.



#### SEE ALSO:

Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users
Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users
Salesforce Help: Set Two-Factor Authentication Login Requirements for Single Sign-On, Social Sign-On, and Communities

## Session Timeout Name Changed in Profile Settings

We've changed the name of the Session Timeout setting that controls how many minutes or hours of inactivity elapse before a session expires for users of a profile. On the profile overview page, in the Session Settings area, the setting is now called Session times out after. This feature is available in both Lightning Experience and Salesforce Classic.

To find the setting, from Setup, enter *Profiles* in the Quick Find box, then select **Profiles**. Select a profile and scroll to Session Settings to view or edit the Session times out after setting.



# EDITIONS

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

#### SEE ALSO:

Salesforce Help: View and Edit Session Timeout Value in Profiles

# Control Session Security Level for Device Activation

A new value in Session Security Levels, Device Activation, gives you more control over how and when your users are prompted to verify their identity. This feature is available in both Lightning Experience and Salesforce Classic.

By default, a user who completes device activation is assigned a standard session security level. If you set a policy that requires users to establish a high-assurance session during login or when accessing a restricted resource, consider changing the Device Activation session security level to High Assurance. That way, users who verify their identity when they activate a device satisfy the high-assurance session requirement. After that, they aren't asked to verify their identity again during that session.

# EDITIONS

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



## SEE ALSO:

Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users Streamlined Setup of Two-Factor Authentication for Single Sign-On and Social Sign-On Users Salesforce Help: Modify Session Security Settings
Salesforce Help: Identity Confirmation Activations

# Track User Identity Verifications

As an administrator, you can now monitor and audit the past six months of your users' identity verification activity. For example, suppose that two-factor authentication is enabled when a user logs in, and the user provides a valid time-based one-time password as proof of identity. That information is recorded in Identity Verification History. This feature is available in both Lightning Experience and Salesforce Classic.

To access Identity Verification History, from Setup, enter *Verification History* in the Quick Find box, then select **Identity Verification History**. To view more information, such as the user's approximate geographic location at the time of verification, create a custom view and add the columns you want. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

## **EDITIONS**

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

## **USER PERMISSIONS**

To view verification history:

"Manage Users"

Time ↓	Verification Attempt	Username	Activity Message	Method	Triggered By	Status	Login Time	Source IP
11/10/2015 11:17:25 AM PST	1306977297	admin1@vht.com	Log In to Salesforce	Salesforce Authenticator	Two-factor authentication required	Access denied	11/10/2015 11:17:07 AM PST	Salesforce.com IP
11/10/2015 11:17:07 AM PST	1306977297	admin1@vht.com	Log In to Salesforce	Salesforce Authenticator	Two-factor authentication required	User challenged; waiting for response	11/10/2015 11:17:07 AM PST	Salesforce.com IP
11/10/2015 11:00:37 AM PST	0897639493	admin1@vht.com	Log In to Salesforce	Salesforce Authenticator	Two-factor authentication required	Succeeded	11/10/2015 11:00:05 AM PST	Salesforce.com IP
11/10/2015 11:00:06 AM PST	0897639493	admin1@vht.com	Log In to Salesforce	Salesforce Authenticator	Two-factor authentication required	User challenged; waiting for response	11/10/2015 11:00:05 AM PST	Salesforce.com IP
10/28/2015 5:27:03 PM PDT	0567708942	apandya@vht.com	Export and Print Reports	Salesforce Authenticator	High assurance session required	User challenged; waiting for response	10/28/2015 5:26:04 PM PDT	Salesforce.com IP

## SEE ALSO:

**Identity Verification History** 

Object Reference for Salesforce and Force.com: Verification History Object

# Implement Identity Verification in Your Custom Solution with Apex

A new Apex method, Auth. SessionManagement.generateVerificationUrl, invokes an identity verification flow in your custom solution. For example, if you have a custom Visualforce page that displays sensitive account details, you can challenge the user to verify identity before viewing it. This feature is available in both Lightning Experience and Salesforce Classic.

To implement identity verification, call

Auth.SessionManagement.generateVerificationUrl from a page display method in your custom page controller. The method initiates an identity verification flow and

returns a URL to the identity verification screen. The user is asked to verify identity with one of the verification methods that the user is registered with, such as Salesforce Authenticator, or a different method that's available to the user. After the user's identity is verified successfully, the user's session changes to the security policy level specified in the method parameter.

SEE ALSO:

**Changed Apex Classes** 

# Improved Security for Identity Verification

Since an IP address isn't a reliable indicator of a user's identity, we've changed our risk-based authentication protocol. When your users log in to Salesforce from a device or browser we don't recognize, they are now prompted to verify identity, even if they log in from an IP address we've seen before.

EDITIONS

**EDITIONS** 

Available in: Enterprise,

**Performance**, **Unlimited**, and **Developer** Editions

Available in all editions

Because of this change, some users are prompted to verify their identity more frequently than in the past, particularly those users who clear browser cookies manually or set their browser to delete cookies. To reduce the number of identity verification prompts while keeping your Salesforce org secure, take one or both of the following steps.

## Add IP ranges to user profiles.

Specify a range of trusted IP addresses from which profile users can log in without being prompted to verify their identity. See Restrict Login IP Ranges in the Enhanced Profile User Interface in the Salesforce Help.

## Set trusted IP ranges for your org.

Specify a range of IP addresses from which all your users can log in without being prompted to verify their identity. See Set Trusted IP Ranges for Your Organization in the Salesforce Help.

SEE ALSO:

Salesforce Help: Activate a Device for Identity Verification
Salesforce Developers Blog: Using Login IP Ranges for Stronger User Security

# Improved Security for High-Assurance Resource Access Using APIs

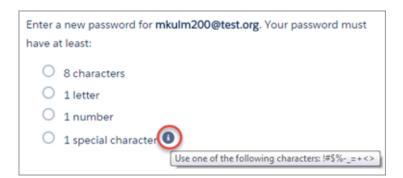
If your org has a policy to require a high-assurance session to access connected apps, reports, or dashboards, you can't access them in a standard-assurance session using the Analytics or SOAP APIs. When using the Analytics API, if you try to access a resource that requires a high-assurance session, you receive an error message. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: Personal, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

# New Special Character Assistance When Changing Passwords

When your users change a password that requires a special character, they now see a tooltip. The tooltip lists the characters that are allowed (!#\$%-\_=+<>). Previously, special characters were described only in Salesforce Help. This feature is available in both Lightning Experience and Salesforce Classic.



## **EDITIONS**

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

SEE ALSO:

Salesforce Help: Passwords

# New Time Values for Connected App Mobile App Settings

You can now allow a mobile-connected app that requires PIN protection to be idle longer before it locks and requires the PIN. Previously, the values for the Require PIN after setting were none (no locking), 1, 5, 10, and 30 minutes. We've added values of 60, 120, 180, and 240 minutes. This feature is available in both Lightning Experience and Salesforce Classic.

The PIN policy is enforced only if a corresponding PIN length is configured. Enforcement of the policy is the responsibility of the connected app. Apps written using the Salesforce Mobile SDK can enforce this policy, or the app can read the policy from the UserInfo service and enforce the policy.

To find the Require PIN after setting for a connected app, from Setup, enter *Connected Apps* in the Quick Find box, then select the option for managing apps. Click **Edit** next to the name of the app you want to modify.

## **EDITIONS**

Connected apps can be created in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Connected apps can be installed in: **All** Editions

# External Identity Users Can Work with Accounts, Person Accounts, Assets, and Contacts

Users with an External Identity license can now read and edit accounts. They can also read, create, and edit assets and contacts. Previously, they couldn't access these objects. If person accounts are enabled in your org, the expanded access lets your external identity users work with person accounts. This feature is available in Salesforce Classic only.

Manage permissions for your external identity users through their profiles or by using permission sets. Sharing rules apply.

This table shows which features are available to users with an External Identity license and a Customer Community license.

# **EDITIONS**

External Identity licenses are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Feature	External Identity	<b>Customer Community</b>
Accounts	<b>▽</b>	<u>~</u>
	Read and Edit	Read and Edit
Assets	<b>▽</b>	<b>▽</b>
	Read, Create, Edit	Read, Create, Edit
Chatter	<b>▽</b>	<b>▽</b>
Contacts	<b>▽</b>	✓
	Read, Create, Edit	
Identity	<b>▽</b>	<b>▽</b>
Cases		<b>▽</b>
		Can create and manage their own cases
Products		<b>✓</b>
		Read only
Orders		<b>✓</b>
Files	<b>▽</b>	<u>~</u>
Chatter Answers		<b>▽</b>
Ideas		✓
Knowledge		✓
		Read only
Tasks		<b>▽</b>
		Read only
Custom Objects	<b>▽</b>	<b>✓</b>
	2 custom objects per license (custom objects in managed packages don't count	10 custom objects per license (custom objects in managed packages don't count
	toward this limit)	toward this limit)
Notes and Attachments		<u>~</u>
		Note: The Notes and Attachments related list is not available on accounts and contacts.
Additional Storage	150 MB (25,000 active users license)	
	2 GB (250,000 active users license)	
	10 GB (1,000,000 active users license)	

Feature External Identity Customer Community

60 GB (5,000,000 active users license)

60 GB (5,000,000 active users license)

## Create a Custom Authentication Provider Plug-in with Apex

You can create your own external auth provider if you don't see your preferred provider on our list. The custom authentication provider plug-in allows you to create your own single sign-on (SSO) auth provider. Admins and users can continue using the SSO credentials they already use for non-Salesforce applications with your Salesforce orgs. This feature is available in both Lightning Experience and Salesforce Classic.

You can already configure your orgs with external authentication providers like Facebook, LinkedIn, and Twitter right out of the box. This plug-in lets you set up your own provider for your Salesforce orgs and communities, even if that provider doesn't adhere to Open-ID Connect protocols. You

EDITIONS

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

can configure the metadata you want the auth provider to handle. You can also add this provider to the Auth Provider option list that admins see when they set up their auth providers.

This plug-in gives admins access to SSO authentication that is both secure and familiar to users. As with other external auth providers, this plug-in requires some setup.

- 1. Create a custom metadata type, and select the custom fields you want your admins to populate during setup. Contact your chosen auth provider to identify the metadata types they require.
- 2. Build the matching Apex classes and methods for your chosen metadata types. Implement the Auth.AuthProviderPlugin interface to create your custom auth provider in the list of available providers.
- **3.** Select your new auth provider from the drop-down menu on the Auth Provider Setup page. Configure the metadata according to the fields you created.
- **4.** Update your application to use the Callback URL generated by Salesforce.
- **5.** Test the connection.

SEE ALSO:

Salesforce Help: About External Authentication Providers
New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces

# Username Added to Identity Verification Email Message

We've added the username to the email that your users receive when they log in to Salesforce from a device we don't recognize. The Subject of the email message is "Verify your identity in Salesforce."

EDITIONS

Available in all editions

SEE ALSO:

Salesforce Help: Activate a Device for Identity Verification

# **Platform Encryption**

Communities users can now read and work with data in encrypted fields. You can encrypt incoming and outgoing email attachments, and more.

## IN THIS SECTION:

## **Encrypt Data in Communities**

Community user profiles can now be assigned the View Encrypted Data permission, so that they can see encrypted data as plaintext.

## **Encrypt Email Attachments**

When Platform Encryption is activated, attachments to incoming and outgoing emails are encrypted.

## Key Management Permission Not Granted by Default

Admins must now actively assign the ability to perform key management roles. The "Manage Encryption Keys" permission is no longer assigned to the standard admin profile.

## Encrypted Fields Are PCI-DSS-Compliant

Fields protected with Platform Encryption are now compliant with the Payment Card Industry Data Security Standard (PCI-DSS).

## Access Encrypted Data Via Lightning Connect

When you link two Salesforce organizations together with Lightning Connect, the subscriber org's users can now access data that's encrypted at rest on the provider org and view that data in plaintext.

## **Encrypt More Account and Contact Fields**

You can now protect even more Account and Contact data with Platform Encryption.

## Don't Encrypt Data With Email Plugins

Safeguards are in place to make sure you deactivate Salesforce for Outlook, Salesforce App for Outlook, or Exchange Sync before encrypting fields or files.

## Access Encrypted Data With Heroku Connect

Heroku Connect supports Platform Encryption when you use API version 35.0 or higher.

## Detect Field Encryption with SObject

You can use the SObject Describe call to retrieve a field's encryption status in an organization where the Platform Encryption license has not been provisioned. This may simplify package management by enabling you to develop a single package for both PE and non-PE orgs.

## Platform Encryption Supports Salesforce for Outlook

Users with with the "View Encrypted Data" permission in their profiles can now use Salesforce for Outlook.

## Platform Encryption Supports Marketing Cloud Connect

Users with with the "View Encrypted Data" permission can now use Marketing Cloud Connect.

## **EDITIONS**

Available as add-on subscription in: **Enterprise**, **Performance**, and **Unlimited** Editions. Available in **Developer** Edition at no charge for organizations created in Summer '15 and later.

Available in Salesforce Classic

## **USER PERMISSIONS**

To manage tenant secrets:

 "Manage Encryption Keys"

To encrypt fields or files:

"Customize Application"

To view setup:

 "View Setup and Configuration"

## **Encrypt Your Knowledge Articles**

Knowledge articles are a great way to share information with your customers and colleagues. Now you can share encrypted data through your Knowledge base by attaching encrypted files to Knowledge articles. To attach encrypted files to a Knowledge article, use an article type with a file field. You can then upload encrypted files as long as you have Platform Encryption enabled.

SEE ALSO:

Salesforce Help: Platform Encryption

## **Encrypt Data in Communities**

Community user profiles can now be assigned the View Encrypted Data permission, so that they can see encrypted data as plaintext.

Administrators can encrypt all the standard and custom fields that are available for encryption, as well as files and attachments.

If you are using Classic Encryption, data in encrypted custom fields is still masked.

When you share personally identifiable information (PII) within a community, the community's specific settings still apply.

You still can't assign the "View Encrypted Data" permission to guest users.



Note: If your organization includes an active portal, you can't encrypt any standard fields.

SEE ALSO:

Idea Exchange: Granting "View Encrypted Data" to Partner and Customer Portal Users

Salesforce Help: Share Personal Contact Information Within Communities

Salesforce Help: Which Fields Can I Encrypt?

# **Encrypt Email Attachments**

When Platform Encryption is activated, attachments to incoming and outgoing emails are encrypted.

When a user sends an email by clicking **Activity History** > **Send an Email**, any attachments sent with email are encrypted.

When a customer sends an email with one or more attachments to create a case (Email to Case), the attachments are stored encrypted. Any attachments the Service user sends to the customer are also encrypted.

SEE ALSO:

Salesforce Help: Set Up On-Demand Email-to-Case

# Key Management Permission Not Granted by Default

Admins must now actively assign the ability to perform key management roles. The "Manage Encryption Keys" permission is no longer assigned to the standard admin profile.

Custom profiles that include the Manage Encryption Keys permission are not affected. Any user who has the permission via a custom profile or permission set will still have the permission.

This change is one of the Critical Updates for this release.

SEE ALSO:

Critical Updates

# Encrypted Fields Are PCI-DSS-Compliant

Fields protected with Platform Encryption are now compliant with the Payment Card Industry Data Security Standard (PCI-DSS).

For organizations with PCI Merchant Level 1 status, data entered into encrypted fields, including credit card-related data, is now processed, stored, and transmitted according to PCI-DSS standards.

This compliance status does not yet extend to encrypted files or encrypted attachments.

SEE ALSO:

Knowledge Article: Salesforce PCI Attestation of Compliance

# Access Encrypted Data Via Lightning Connect

When you link two Salesforce organizations together with Lightning Connect, the subscriber org's users can now access data that's encrypted at rest on the provider org and view that data in plaintext.

A user's access to encrypted data on the subscriber org is determined by the credentials Lightning Connect uses to connect that user to the provider org. Which credentials are used is determined by the identity type of the external data source definition on the subscriber org.

Those credentials are associated with a specific user on the provider org. If that user on the provider org has the "View Encrypted Data" permission, users on the subscriber org who are connected with those credentials can view encrypted data on the provider org.

For example, suppose the Salesforce admin for the provider org has encrypted the Account Name field.

- If the subscriber org user is connected via Lightning Connect as a provider org user with the "View Encrypted Data" permission, they see the Account Name field contents as plaintext.
- If the subscriber org user is connected via Lightning Connect as a provider org user without the "View Encrypted Data" permission, the Account Name field contents are masked (that is, the values are replaced with asterisks).

SEE ALSO:

Salesforce Help: User Access to External Data in Lightning Connect Salesforce Help: Lightning Connect

# **Encrypt More Account and Contact Fields**

You can now protect even more Account and Contact data with Platform Encryption.

In Accounts, you can encrypt these additional standard fields:

- Description
- Website
- Fax
- Phone

In Contacts, you can encrypt the Description field.

SEE ALSO:

Salesforce Help: Which Fields Can I Encrypt?

# Don't Encrypt Data With Email Plugins

Safeguards are in place to make sure you deactivate Salesforce for Outlook, Salesforce App for Outlook, or Exchange Sync before encrypting fields or files.

If Exchange Sync or Salesforce App for Outlook is active, the validation check prevents Platform Encryption from activating. If Salesforce for Outlook is activated, Platform Encryption can be activated, but Salesforce for Outlook stops working.

Conversely, if Platform Encryption is activated, none of the three plugins works.

SEE ALSO:

Salesforce Help: Automatic Validation for Platform Encryption

## Access Encrypted Data With Heroku Connect

Heroku Connect supports Platform Encryption when you use API version 35.0 or higher.

If you are using Platform Encryption, select API version Winter '16 v35.0 or higher. Version 35 supports retrieval of objects with Platform Encryption enabled. Previous API versions do not.

Heroku Connect typically requires View All Data permission, and it may also be necessary to grant Modify All Data permission when dealing with relationships between objects. Both the user and the Salesforce organization also need to have API Enabled permission.

SEE ALSO:

How Heroku Connect Works

## **Detect Field Encryption with SObject**

You can use the SObject Describe call to retrieve a field's encryption status in an organization where the Platform Encryption license has not been provisioned. This may simplify package management by enabling you to develop a single package for both PE and non-PE orgs.

For example, if a field is not encrypted, your package can run a SOQL/WHERE or ORDER BY operation, but if it is encrypted, you might run a SOSL/FIND query instead.

Encryption is said to be set for a field when encryption is on for both the organization and the field. When that is the case, SObject Describe returns encrypted="true". If encryption is on for either the organization or the field, it returns encrypted="false".

SEE ALSO:

Describing sObjects Using Schema Method

# Platform Encryption Supports Salesforce for Outlook

Users with with the "View Encrypted Data" permission in their profiles can now use Salesforce for Outlook.

Keep in mind that if you encrypt the same fields that you filter in Salesforce for Outlook data sets, Salesforce for Outlook won't sync at all. But it's easy to get Salesforce for Outlook to sync again. Just remove the encrypted fields from your filters in your data sets.

# Platform Encryption Supports Marketing Cloud Connect

Users with with the "View Encrypted Data" permission can now use Marketing Cloud Connect.

Marketing Cloud Connect connects the digital marketing capabilities of the Salesforce Marketing Cloud with the data management, segmentation and campaign management tools in Salesforce. Now Marketing Cloud Connect users with the "View Encrypted Data" permission can see data in fields that are encrypted in Salesforce. Encrypted data is stored in the marketing cloud in the format that the running user sees that data in the Sales or Service Cloud.

SEE ALSO:

Marketing Cloud Connect Encryption

## **Encrypt Your Knowledge Articles**

Knowledge articles are a great way to share information with your customers and colleagues. Now you can share encrypted data through your Knowledge base by attaching encrypted files to Knowledge articles. To attach encrypted files to a Knowledge article, use an article type with a file field. You can then upload encrypted files as long as you have Platform Encryption enabled.

# Transaction Security Policies Address Security Issues

Transaction Security is a framework that intercepts real-time Salesforce events and applies appropriate actions and notifications based on security policies you create. Transaction Security monitors events according to the policies that you set up. These policies are applied against events in your org and specify actions to take when certain event combinations occur. When a policy is triggered, you can have an action taken and receive an optional notification. This feature is available in both Lightning Experience and Salesforce Classic.



**Note:** Customers are required to purchase Salesforce Shield or Salesforce Shield Event Monitoring add-on subscriptions to use this feature. For pricing details, contact your Salesforce account executive.

The real-time actions that can be taken are:

- Notify a Salesforce admin that the policy was triggered
- Block the operation
- Require the use of two-factor authentication
- Require the end of a current login session

Transaction Security includes predefined policies to limit concurrent login sessions and to block excessive data downloads done through APIs. Both example policies come with a corresponding Apex implementation class. An administrator can edit the Apex classes and enable the policies immediately.

For example, you modify the Concurrent Sessions Limiting policy to notify you via email when the policy is triggered. You also update the policy's Apex implementation to limit users to three sessions instead of the default five sessions. (That's easier than it may sound.) Later, a user with three login sessions tries to create a fourth. The policy requires the user to end one of the existing sessions before starting the new session. At the same time, you are notified that the policy was triggered.

## **USER PERMISSIONS**

To create, edit, and manage transaction security policies:

"Author Apex"

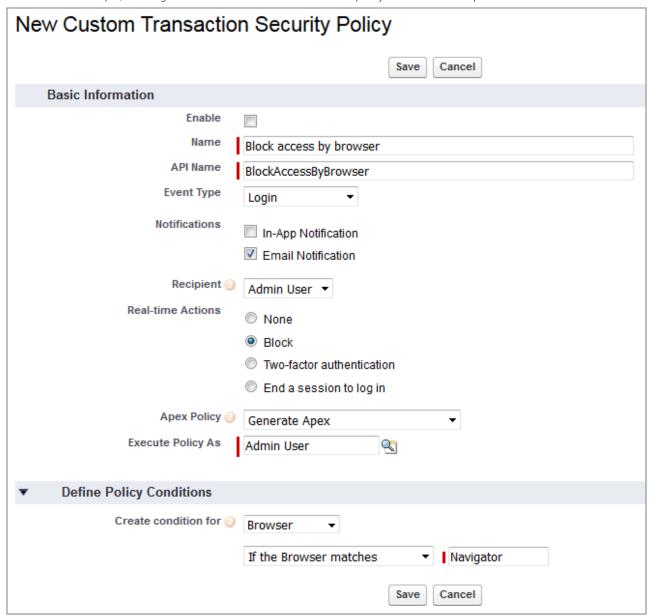
AND

"Customize Application"

# EDITIONS

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

Here's another example, showing the user interface and how to create a policy to block use of a specific browser.



In this example we've asked Transaction Security to generate the policy code. Here's the generated code with some added comments:

```
}
}
```

You can modify the generated Apex to perform additional tasks, such as block when there's a specific platform and browser combination. Here's the modified code, again with comments added:

Along with all the Apex features, you can also use external web services when implementing policies. This ability gives you great flexibility without having to write extra code. And in case there's a conflict in policy actions, Transaction Security resolves actions with the same event type in the following order: The Block action is taken before Two-Factor Authentication, and both of those actions are taken before Ending a Session.

Many other examples are available in the online help. The following is a partial list.

- Requiring high-assurance login sessions when accessing confidential data
- Blocking access from specific locations or IP addresses
- Limiting the posting rate on Chatter
- Restricting platform and browser access to specific types
- Blocking users with vulnerable or outdated systems

## SEE ALSO:

Salesforce Help: About Transaction Security Policies
Salesforce Help: Apex Policies for Transaction Security Notifications

# **Platform Security**

You can use the new Health Check tool to identify and fix security risks in your password, session, and network access settings, all at a glance.

## IN THIS SECTION:

## View and Address Security Risks Using Health Check

At a glance, you can now see and fix security risks in your Session Settings, Password Policies, and Network Access settings. A new health check dashboard shows how well your org measures against the Salesforce-recommended baseline. Health Check lets you understand and proactively remediate your org's security risks and vulnerabilities from a single page. This feature is available in both Lightning Experience and Salesforce Classic.

## Default Certificate is 2048 Bits

If you use client certificates or custom web address https certificates, you can now create a 2048-bit certificate or a 4096-bit certificate. The option to create a 1024-bit certificate has been removed.

#### Upgrade Your Transport Layer Security (TLS) Version for HTTPS Connections

Starting in Spring '16, Salesforce is disabling the TLS 1.0 encryption protocol using a phased approach. You can test and upgrade to TLS 1.1 or TLS 1.2 early to give your org more time to verify end-to-end compatibility. This feature is available in both Lightning Experience and Salesforce Classic.

## Use an API Client Certificate for Improved Security

You can now choose an org-specific API client certificate for workflow outbound messages, the AJAX proxy, some Apex PageReference methods, and delegated authentication HTTPS callouts. This change improves security and maintains productivity after a planned Microsoft Windows update on April 19, 2016 that retires the root certificate of the older proxy.salesforce.com certificate.

# View and Address Security Risks Using Health Check

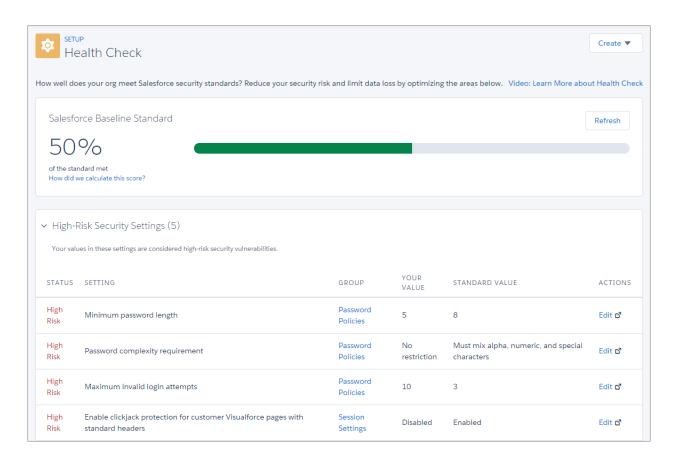
At a glance, you can now see and fix security risks in your Session Settings, Password Policies, and Network Access settings. A new health check dashboard shows how well your org measures against the Salesforce-recommended baseline. Health Check lets you understand and proactively remediate your org's security risks and vulnerabilities from a single page. This feature is available in both Lightning Experience and Salesforce Classic.

The Salesforce Baseline standard contains recommended values for the Session Settings, Password Policies, and Network Access setting groups. If you change all of a group's settings to be less restrictive than what's in the Salesforce Baseline standard, your health check score decreases.

From Setup, enter Health Check in the Quick Find box, then select Health Check.

## **EDITIONS**

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



The dashboard shows high and medium risk settings and how they compare against the standard. To remediate a risk, click the edit link next to the setting. All of your settings that meet the standard are listed at the bottom.



**Example:** Suppose that you changed your password minimum length from 8 (the default value) to 5, and changed other Password Policies settings to be less restrictive. These changes make your users' passwords more vulnerable to guessing and other brute force attacks. As a result, your overall score decreases, and the settings are listed as risks.

#### SEE ALSO:

Salesforce Help: Security Health Check
Salesforce Help: How Is the Health Check Score Calculated?

## Default Certificate is 2048 Bits

If you use client certificates or custom web address https certificates, you can now create a 2048-bit certificate or a 4096-bit certificate. The option to create a 1024-bit certificate has been removed.

4096-bit keys are not required, but can be used where security requirements are especially strict and the unlimited-strength jurisdiction policy files are present.

1024-bit certificates are no longer acceptable to many customers and certificate authorities.

## Upgrade Your Transport Layer Security (TLS) Version for HTTPS Connections

Starting in Spring '16, Salesforce is disabling the TLS 1.0 encryption protocol using a phased approach. You can test and upgrade to TLS 1.1 or TLS 1.2 early to give your org more time to verify end-to-end compatibility. This feature is available in both Lightning Experience and Salesforce Classic.

We're disabling TLS 1.0 so we can maintain the highest security standards and promote the safety of your data. This change also impacts Salesforce Communities, Customer and Partner portals, and your other Salesforce-hosted websites.

You can make this change early through a critical update. Before enabling it in your production org, we recommend that you test this update in a sandbox or Developer Edition org.

From Setup, enter Critical Updates in the Quick Find box, then select Critical Updates.

SEE ALSO:

Knowledge Article: Salesforce disabling TLS 1.0

# Use an API Client Certificate for Improved Security

You can now choose an org-specific API client certificate for workflow outbound messages, the AJAX proxy, some Apex PageReference methods, and delegated authentication HTTPS callouts. This change improves security and maintains productivity after a planned Microsoft Windows update on April 19, 2016 that retires the root certificate of the older proxy.salesforce.com certificate.

EDITIONS

**EDITIONS** 

**Fditions** 

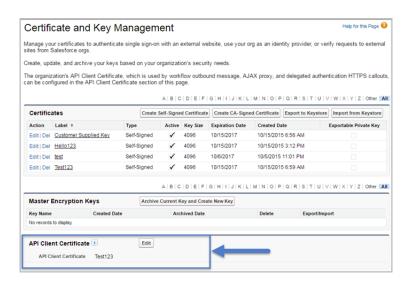
Available in: **Professional**, **Enterprise**, **Performance**,

Unlimited, and Developer

Available in all editions

If you have remote HTTPS endpoints that use the Microsoft Trusted Root Certificate Program, and if the endpoints require a client certificate for select Salesforce features, they will be impacted if you install the Windows update.

To prevent loss of productivity for those features, before you install the Windows update, switch to using an org-specific API client certificate. To create or manage a client certificate, from Setup, enter <code>Certificate</code> in the <code>Quick Find</code> box, then select <code>Certificate</code> and <code>Key Management</code>.





Note: This change is available following the completion of this Salesforce patch release to all production orgs.

SEE ALSO:

Salesforce Knowledge Article: Salesforce Client Certificate Impacted by Upcoming Microsoft Windows Update

# Deployment

You now have new ways to deploy changes to your Salesforce org. Deployment changes include test options for change sets. Sandbox enhancements include a new sandbox copy engine and increased Developer Sandbox licenses.

# EDITIONS

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

#### IN THIS SECTION:

#### Improved Deployment Experience During Service Updates

If a Salesforce scheduled service update occurs while your change set deployment is running tests, test execution now resumes after the service is restored. Results of already executed tests are preserved, and those tests aren't rerun. Because the majority of deployment time is spent executing tests, resuming tests saves you a lot of time. Previously, test execution was restarted from the beginning. Salesforce service updates include minor maintenance updates and major releases.

## Enhanced Security with the Force.com Migration Tool

Force.com Migration Tool version 36.0 now enables TLS 1.1 and 1.2 protocols when it detects Java version 7 (1.7) on the client. For enhanced security, we recommend using Java version 7 or later with the new version of the Force.com Migration Tool. If you use Java version 6, TLS 1.0 is used for secure communications with Salesforce. However, Salesforce plans to discontinue TLS 1.0 support in the near future. If you use Java version 7 or 8, TLS 1.2 is used.

## Sandbox Enhancements

Sandbox enhancements include a new sandbox copy engine, increased Developer Sandbox licenses, and post-copy scripting.

SEE ALSO:

Metadata API Types

# Improved Deployment Experience During Service Updates

If a Salesforce scheduled service update occurs while your change set deployment is running tests, test execution now resumes after the service is restored. Results of already executed tests are preserved, and those tests aren't rerun. Because the majority of deployment time is spent executing tests, resuming tests saves you a lot of time. Previously, test execution was restarted from the beginning. Salesforce service updates include minor maintenance updates and major releases.

In the previous release, we provided this enhancement only for deployments started with the Metadata API or API-based tools, such as the Force.com Migration Tool. In this release, we're providing the test resumption enhancement also for change sets.



## Note:

- Salesforce saves the results of executed tests in chunks. Therefore, a small portion of tests might not have their results saved because they weren't part of the last saved chunk. These tests are rerun when the deployment is restarted.
- If the deployment interruption happens before tests have started, the entire deployment restarts from the beginning.



Tip: Salesforce performs major service upgrades three times a year, and minor maintenance updates throughout the year. Long deployments that take several hours to complete are more likely to hit a service update window than shorter deployments. Even

though test resumption in restarted deployments can save you time, we recommend that your deployments run as efficiently as possible to lower the chance of interrupted deployments. We recommend that you use these deployment features, which were added in the last few releases, to shorten the run time of your deployments.

## Perform a Quick Deployment

Deploy a recent validation to bypass the execution of tests in your production instance. See Quick Deployments in Salesforce Help and Deploying a Recent Validation in the Force.com Migration Tool Guide.

#### **Run a Subset of Tests**

Use the RunSpecifiedTests test level to run only the tests you specify instead of all Apex tests in your org. See Running a Subset of Tests in a Deployment in the Force.com Migration Tool Guide.

To check whether your Salesforce instance is due for an upgrade, see http://trust.salesforce.com.

# Enhanced Security with the Force.com Migration Tool

Force.com Migration Tool version 36.0 now enables TLS 1.1 and 1.2 protocols when it detects Java version 7 (1.7) on the client. For enhanced security, we recommend using Java version 7 or later with the new version of the Force.com Migration Tool. If you use Java version 6, TLS 1.0 is used for secure communications with Salesforce. However, Salesforce plans to discontinue TLS 1.0 support in the near future. If you use Java version 7 or 8, TLS 1.2 is used.

## Sandbox Enhancements

Sandbox enhancements include a new sandbox copy engine, increased Developer Sandbox licenses, and post-copy scripting.

#### IN THIS SECTION:

## Improved Sandbox Copy Engine for Partial and Full Copies with Templates Sandboxes (Generally Available)

We've rebuilt our sandbox copy engine to optimize performance, scalability, and customer success. The new engine impacts Partial and Full copies with templates sandboxes as they are created and existing Partial and Full copies with templates sandboxes as they are refreshed.

## Increased Developer Sandbox Licenses

In App Cloud, our vision is to enable every developer to build apps frequently and quickly. We've increased the number of Developer Sandbox licenses for Professional, Enterprise, Performance, and Unlimited Edition orgs. You can now create more Developer sandboxes to develop, test, and deploy your custom apps. With more developer environments, you can reduce the time it takes to convert your ideas into apps.

## Run Script After Sandbox Creation and Refresh

To make your sandbox environment business ready, automate data manipulation or business logic tasks.

# Improved Sandbox Copy Engine for Partial and Full Copies with Templates Sandboxes (Generally Available)

We've rebuilt our sandbox copy engine to optimize performance, scalability, and customer success. The new engine impacts Partial and Full copies with templates sandboxes as they are created and existing Partial and Full copies with templates sandboxes as they are refreshed.

Several enhancements to the copy engine make sandbox creation and refresh faster and minimize sandbox inconsistencies. These improvements are available on a rolling basis during the Spring '16 release.

## Intelligent Routing

The copy engine selects the best instance for your sandbox based on available storage space, CPU consumption, and import activity on each sandbox instance.

## **New Data Copy Framework**

The copy engine divides your organization's data into small chunks for exporting and copying to the sandbox. Copying is faster, because chunks are processed in parallel. Importing begins when the first data chunk is exported. Export and import are independent, so the system is robust and flexible.

## **New Post-Copy Framework**

If a production organization changes during sandbox creation or refresh, the sandbox can contain data inconsistencies. The new automated post-copy process quickly fixes these inconsistencies after copying is complete and tracks the fixes.

## **Progress Tracking**

You can monitor the progress of your sandbox creation or refresh. From Setup, click **Sandboxes** or **Data Management** > **Sandboxes** to view a list of your sandboxes. The list displays a progress bar for sandboxes in the queue, in process, or recently completed. Hover over the progress bar to view the percentage completed of a copy in progress. Click a name to go to a detail page showing information about the sandbox, including how much time before the next available refresh. If your sandbox is suspended or stopped for more than one hour, contact Salesforce Customer Support.

# Increased Developer Sandbox Licenses

In App Cloud, our vision is to enable every developer to build apps frequently and quickly. We've increased the number of Developer Sandbox licenses for Professional, Enterprise, Performance, and Unlimited Edition orgs. You can now create more Developer sandboxes to develop, test, and deploy your custom apps. With more developer environments, you can reduce the time it takes to convert your ideas into apps.

The following table summarizes the increase in Developer Sandbox licenses by edition.

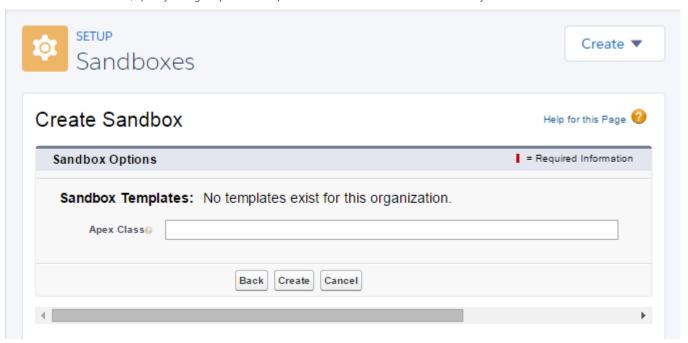
EditionPrevious Number of LicensesLicenses in Spring '16Professional Edition010Enterprise Edition125Performance Edition30100Unlimited Edition15100

**Table 3: Developer Sandbox Licenses by Edition** 

# Run Script After Sandbox Creation and Refresh

To make your sandbox environment business ready, automate data manipulation or business logic tasks.

At sandbox creation, specify a single Apex class to perform the tasks. This class executes every time the sandbox is



Create an Apex class that implements SandboxPostCopy and specify the class here. For example, the following Apex class simply reports the three contexts available in SandboxPostCopy: your organization ID, sandbox ID, and sandbox name:

# Development: Create Your Own Salesforce App

Force.com helps you develop new applications and integrations to help your organization or for resale to other organizations.

## IN THIS SECTION:

## **Custom Metadata Types**

Migrate app configuration records even more effectively with added support for picklists, upsert, and more.

## Visualforce

Develop apps to customize your organization using Visualforce. Use Visualforce to build pages and apps in Lightning Experience, the Salesforce1 mobile app, Salesforce Classic, and Communities. Visualforce language and feature improvements make app development easier. Enhancements in this release are focused on Lightning Experience.

## Apex Code

We've improved your experience with Apex testing. We've also upgraded functionality related to Chatter, session management, the platform cache, the flex queue, reporting, record locks and unlocks, and more.

## **Lightning Components**

The Lightning Component framework powers Lightning Experience and Salesforce 1. Use the framework to build mobile apps and pages in Lightning Experience, Salesforce 1, Salesforce Classic, and Communities. Enhancements this release are focused on toolkit robustness. This release also offers early access to new capabilities for deploying Lightning Components apps in non-Salesforce containers, new visual design tools, and more sophisticated label formatting.

#### AP

Access more metadata types and data objects in API version 36.0.

#### **ISVforce**

ISVforce tools make it easy to build, package, and distribute your apps and Lightning components. Spring '16 includes support for the Environment Hub in Lightning Experience and enhancements to the License Management App and API.

# **Custom Metadata Types**

Migrate app configuration records even more effectively with added support for picklists, upsert, and more.

#### IN THIS SECTION:

#### **Bulk Create Custom Metadata Records**

Use the custom metadata loader to bulk load custom metadata records to Salesforce from a .csv file.

## Added Support for Custom Picklist Fields (Beta)

In addition to number fields, text fields, and more, you can now include custom picklist fields in your custom metadata types.

## **Upsert Custom Metadata Records**

Tired of worrying about duplicate record creation? Upsert support is here for you.

## **Bulk Create Custom Metadata Records**

Use the custom metadata loader to bulk load custom metadata records to Salesforce from a .csv file.

Imagine that you want to create a set of custom metadata records that map country codes to country names. Instead of creating each of these records manually, you can load them directly to your org from a .csv file. Simply download and deploy the custom metadata loader and upload a .csv file to create your records.

You can download the custom metadata loader tool here.

# Added Support for Custom Picklist Fields (Beta)

In addition to number fields, text fields, and more, you can now include custom picklist fields in your custom metadata types.

This release contains a beta version of custom picklist fields in custom metadata types that is production quality but has known limitations. This feature is available by default in sandboxes and Developer Edition organizations. For all other organizations, contact Salesforce to enable this feature. To provide feedback and suggestions, go to the Success Community.

# **Upsert Custom Metadata Records**

Tired of worrying about duplicate record creation? Upsert support is here for you.

You can now use the API upsertMetadata () function to insert or update custom metadata records.

## EDITIONS

Available in: Enterprise,
Performance, Unlimited,
Developer, and
Database.com Editions

## **Visualforce**

Develop apps to customize your organization using Visualforce. Use Visualforce to build pages and apps in Lightning Experience, the Salesforce1 mobile app, Salesforce Classic, and Communities. Visualforce language and feature improvements make app development easier. Enhancements in this release are focused on Lightning Experience.

These release notes explain new features in this release.

For further information on features affected by these enhancements, refer to the *Visualforce Developer's Guide*.

# **EDITIONS**

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

#### IN THIS SECTION:

## Visualforce for Lightning Experience (Beta)

This release contains a beta version of Visualforce for Lightning Experience that is production quality but has known limitations.

## Add Visualforce Pages to the Lightning Experience Navigation Menu

Customize the Lightning Experience navigation menu by adding Visualforce tabs. This capability already exists in Salesforce Classic and the Salesforce1 mobile app. Now you can do it in Lightning Experience.

## Use User.UITheme and UserInfo.getUiTheme() to Determine User Experience Context

The User.UITheme and User.UIThemeDisplayed global variables and the UserInfo.getUiTheme() and UserInfo.getUiThemeDisplayed() Apex utility methods are improved to support the Salesforce1 mobile app and Lightning Experience.

## "Serve Static Resources from the Visualforce Domain" Critical Update Postponed

In Summer '15, we changed the domain from which static resources are served. This change was released as a critical update named "Serve Static Resources from the Visualforce Domain" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

## "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed

In Summer '15, we changed the behavior of the <code>getContent()</code> and <code>getContentAsPDF()</code> methods of the <code>PageReference</code> object. This change was released as a critical update named "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

# Visualforce for Lightning Experience (Beta)

This release contains a beta version of Visualforce for Lightning Experience that is production quality but has known limitations.

Visualforce itself remains Generally Available. It's only the use of Visualforce pages with Lightning Experience enabled that's considered beta.

For a summary of Visualforce for Lightning Experience issues, see What's Not Available in Spring '16 Lightning Experience Features elsewhere in the release notes. To get started creating apps for Lightning Experience with the full details, see the Lightning Experience Development trail on Trailhead.

#### SEE ALSO:

Salesforce Help: What's Not Available in Lightning Experience Trailhead: Visualforce & Lightning Experience Trailhead: Developer Trail - Lightning Experience Trailhead

# Add Visualforce Pages to the Lightning Experience Navigation Menu

Customize the Lightning Experience navigation menu by adding Visualforce tabs. This capability already exists in Salesforce Classic and the Salesforce1 mobile app. Now you can do it in Lightning Experience.

For details of how to customize the Lightning Experience navigation menu, see Customize the Navigation Experience for Lightning Experience Users elsewhere in the release notes.

SEE ALSO:

Customize the Navigation Experience for Lightning Experience Users

# Use user.uitheme and userInfo.getuitheme() to Determine User Experience Context

The User.UITheme and User.UIThemeDisplayed global variables and the UserInfo.getUiTheme() and UserInfo.getUiThemeDisplayed() Apex utility methods are improved to support the Salesforce1 mobile app and Lightning Experience.

These existing variables and system calls have expanded the range of return values to support the new user experience contexts. Possible return values include the following.

- Theme1—Obsolete Salesforce theme
- Theme 2—Salesforce Classic 2005 user interface theme
- Theme 3—Salesforce Classic 2010 user interface theme
- Theme 4d—Modern "Lightning Experience" Salesforce theme
- Theme4t—Salesforce1 mobile Salesforce theme
- PortalDefault—Salesforce Customer Portal theme
- Webstore—Salesforce AppExchange theme

These global variables and system calls can replace other, more fragile methods of detecting the user experience context, such as testing for the presence of the sforce. one JavaScript global. Use them to write Visualforce pages and apps that adapt to the user experience context in which they're running.

# "Serve Static Resources from the Visualforce Domain" Critical Update Postponed

In Summer '15, we changed the domain from which static resources are served. This change was released as a critical update named "Serve Static Resources from the Visualforce Domain" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

SEE ALSO:

Summer '15 Release Notes: Serve Static Resources from the Visualforce Domain Critical Updates

# "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed

In Summer '15, we changed the behavior of the getContent() and getContentAsPDF() methods of the PageReference object. This change was released as a critical update named "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

We've also further increased the flexibility of calling getContent(). See the details in the Apex section of the release notes.

## SEE ALSO:

Make Calls to PageReference.getContent() After DML and Savepoints

Summer '15 Release Notes: PageReference getContent() and getContentAsPDF() Methods Behave as Callouts

Critical Updates

## **Apex Code**

We've improved your experience with Apex testing. We've also upgraded functionality related to Chatter, session management, the platform cache, the flex queue, reporting, record locks and unlocks, and more.

Apex includes the following enhancements. For detailed information on these enhancements, refer to the *Apex Developer Guide*.

## **EDITIONS**

Available in: Enterprise, Performance, Unlimited, Developer, and Database.com Editions

## IN THIS SECTION:

## Create More Robust Apex Tests and More Flexible Test Runs

We've made lots of improvements to Apex tests and the ways you can run them.

## Locate Jobs in the Apex Flex Queue

You can now query the FlexQueueltem object to find the position of an asynchronous Apex job in the flex queue. Thanks to the FlexQueueltem object's AsyncApexJobId field, your query can also include fields from the AsyncApexJob object. Include AsyncApexJob fields in your query to get information such as the job's creation date or details about the Apex class to be executed.

## Test Performance Gains with Platform Cache Trials

You can now request trial cache space to test performance improvements by using Platform Cache in your applications. Enterprise, Unlimited, and Performance editions come with some cache, but adding more cache often provides greater performance. When your trial request is approved, you can allocate capacity to partitions and experiment with using the cache for different scenarios. Testing the cache on a trial basis lets you make an informed decision about whether to purchase cache. This feature is available in Salesforce Classic only.

## Purchase Platform Cache

You can now purchase Platform Cache space, which can significantly improve performance of your applications. This feature is available in Salesforce Classic only.

## Make Calls to PageReference.getContent() After DML and Savepoints

We've further relaxed the restrictions on calling getContent() and getContentAsPdf() after performing DML operations to include creating Savepoints. If the calls to getContent() and getContentAsPdf() are internal calls, they're now allowed.

## Find the Renamed Apex Developer Guide More Easily

We've renamed the Force.com Apex Code Developer's Guide to the Apex Developer Guide. On https://developer.salesforce.com/docs, this guide now appears near the top of the alphabetical list in Documentation Version Spring '16 (API version 36.0) and later. We made the change because Apex Developer Guide is easier to remember and type than Force.com Apex Code Developer's Guide—or was it Force.com Apex Developer's Guide, Apex Code Developer's Guide, or Force.com Apex Code Developer Guide? (Yes, people have called it all these things and more.)

#### New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces

These classes, methods, constants, enumerations, exceptions, and interfaces are new or have changed.

## ConnectApi (Chatter in Apex)

Chatter in Apex includes new and changed Apex classes, input classes, output classes, and enums.

## Create More Robust Apex Tests and More Flexible Test Runs

We've made lots of improvements to Apex tests and the ways you can run them.

#### IN THIS SECTION:

## Create Test Suites of Commonly Used Apex Test Classes

You probably have sets of Apex test classes that you regularly run together. For example, perhaps you have test classes that you run every time you prepare for a deployment or Salesforce releases a new version. You can now create test suites that contain those sets of classes. Rather than selecting all the relevant classes each time you start a test run, you can simply run one or more test suites. This feature is available in both Lightning Experience and Salesforce Classic.

## Stop a Test Run That's Failing Miserably

Large runs of Apex tests sometimes take longer than we'd like them to. Waiting for a run to finish only to learn that many of your tests failed can be irritating. You can now configure test runs to stop executing new tests after a given number of tests fail. You no longer need to waste your time waiting for the results of a run that you're going to rerun after fixing issues in your org. You can set how many tests can fail in test runs that you execute both in the Developer Console and using the Tooling API. This feature is available in both Lightning Experience and Salesforce Classic.

## Set and Modify the CreatedDate Field in Apex Tests

In response to your IdeaExchange request, we've added the System.Test.setCreatedDate method. This method sets a Datetime value for a test-context sObject's CreatedDate field.

## Call Test.startTest() to Reliably Reset Limits in Apex Tests

A block of test code enclosed by the Test.startTest() and Test.stopTest() methods now reliably receives its own block of governor limits. Test.startTest() stores your per-transaction limit counters and temporarily resets them to zero. Test.stopTest() restores your limit counters to pre-Test.startTest() values. When your test method finishes, all per-transaction limits reset to zero. Previously, some limits, such as for SOQL queries, didn't always reset inside a Test.startTest()/Test.stopTest() block.

## Use @future to Avoid the Dreaded MIXED\_DML\_OPERATION Error in Apex Tests

Mixed Data Manipulation Language (DML) operations within a single transaction aren't allowed. You can't perform DML on a setup sObject and a non-setup sObject in the same transaction. Instead, you can perform one type of DML as part of an asynchronous job and run the other types in other asynchronous jobs or in the original transaction. This alternative is widely used. However, when this alternative was used within the context of an Apex test, errors still resulted. We've fixed this bug.

## Compare Currency to Decimals in Apex Tests

We've fixed a bug that caused an exception to be thrown when comparing a Currency value to a Decimal value in an Apex test. You can now use data silos that contain both Currency values and Decimal values and compare these data types to your heart's content.

## Test WSDL-Based Asynchronous Callouts

Previously, you could test synchronous WSDL-based callouts, or you could test asynchronous non-WSDL-based callouts. But testing asynchronous callouts made from an imported WSDL caused your tests to fail with an internal Salesforce error. We've fixed this bug.

## Create Test Suites of Commonly Used Apex Test Classes

You probably have sets of Apex test classes that you regularly run together. For example, perhaps you have test classes that you run every time you prepare for a deployment or Salesforce releases a new version. You can now create test suites that contain those sets of classes. Rather than selecting all the relevant classes each time you start a test run, you can simply run one or more test suites. This feature is available in both Lightning Experience and Salesforce Classic.

## Create and Run Test Suites in the Developer Console

To create a test suite using the Developer Console, select **Test** > **New Suite**. To choose which classes are in a test suite, select **Test** > **Suite Manager** > *Your Test Suite* > **Edit Suite**. You can create or modify test suites that contain up to 200 test classes using the Developer Console.

To run one or more test suites' member classes from the Developer Console, select **Test** > **New Suite Run**.

## Create and Run Test Suites in the API

Each test suite is represented in the SOAP, REST, and Tooling APIs by an ApexTestSuite object, which has a TestSuiteName and an ID. A set of TestSuiteMembership objects, each of which contains an ApexTestSuiteId and an ApexClassId, determines membership in the test suite. Create one TestSuiteMembership object for each class that you want to add to each test suite. To remove a test class from a test suite, delete its TestSuiteMembership object.

The following SOQL query returns the membership object that relates this Apex class to this test suite.

```
SELECT Id FROM TestSuiteMembership WHERE ApexClassId = '01pD0000000Fhy9IAC'
AND ApexTestSuiteId = '05FD00000004CDBMA2'
```

To run test suites using the Tooling REST API, POST a suiteids list to the runTestsAsynchronous REST resource. You can POST both a suiteids list and a classids list to runTestsAsynchronous. However, if you send a tests array, you can't send suiteids or classids.

To run test suites using the Tooling SOAP API, pass suite IDs to the runTestsAsynchronous() SOAP call. Either a classids or a suiteids parameter is mandatory for runTestsAsynchronous, but only one of the two is required. To provide only one, specify the other as null.

## SEE ALSO:

SOAP API Developer Guide: ApexTestSuite

SOAP API Developer Guide: TestSuiteMembership

SOAP API Developer Guide: ApexTestSuite

SOAP API Developer Guide: TestSuiteMembership

## Stop a Test Run That's Failing Miserably

Large runs of Apex tests sometimes take longer than we'd like them to. Waiting for a run to finish only to learn that many of your tests failed can be irritating. You can now configure test runs to stop executing new tests after a given number of tests fail. You no longer need to waste your time waiting for the results of a run that you're going to rerun after fixing issues in your org. You can set how many tests can fail in test runs that you execute both in the Developer Console and using the Tooling API. This feature is available in both Lightning Experience and Salesforce Classic.

## Choose a Test Failure Threshold

To allow all tests in your org to run, either don't set a test failure threshold or set the threshold to -1. To stop your test run from executing new tests after a given number of tests fail, set the failure threshold to an integer value from 0 to 1,000,000. This integer value sets the maximum allowable test failures. A value of 0 causes the test run to stop if any failure occurs. A value of 1 causes the test run to stop on the second failure, and so on.

Synchronous test runs stop when the failure threshold is exceeded. However, asynchronous test runs execute tests in parallel, so they take a bit longer to stop. An asynchronous test run stops after it finishes executing the tests that are in progress when the failure threshold is exceeded.

Keep in mind that high values can cause slow performance. Each 1,000 tests that you allow to fail adds about 3 seconds to your test run, not including the time that the tests take to execute.

## Set Allowed Test Failures in the Developer Console

The Developer Console's test run configuration panes have a new Settings button. To specify how many tests can fail before a test run or test suite run is canceled, click **Settings**, enter a value for Number of failures allowed, and then click **OK**. This value applies for all test runs that you execute, until you close the Developer Console or set a new value.

## Set maxFailedTests Using the Tooling API

You can set a maxFailedTests value for a Tooling API REST resource or SOAP call. To use REST, POST the optional maxFailedTests parameter to the runTestsAsynchronous resource. To use SOAP to limit failed tests in a synchronous test run, send a value for RunTestsRequest.maxFailedTests to the runTests() call. To use SOAP to limit failed tests in an asynchronous test run, send a maxFailedTests value above -1 to the runTestsAsynchronous() call.

SEE ALSO:

Force.com Tooling API: REST Resources
Force.com Tooling API: SOAP Calls

## Set and Modify the CreatedDate Field in Apex Tests

In response to your IdeaExchange request, we've added the System.Test.setCreatedDate method. This method sets a Datetime value for a test-context sObject's CreatedDate field.

Insert your test record before you set its CreatedDate, as shown in this example.

```
@isTest
private class SetCreatedDateTest {
    static testMethod void testSetCreatedDate() {
        Account a = new Account(name='myAccount');
        insert a;
        Test.setCreatedDate(a.Id, DateTime.newInstance(2012,12,12));
```

SEE ALSO:

IdeaExchange: Allow the setting and modification of the CreatedDate field in unit tests.

Apex Developer Guide: setCreatedDate (recordId, createdDatetime)

## Call Test.startTest() to Reliably Reset Limits in Apex Tests

A block of test code enclosed by the Test.startTest() and Test.stopTest() methods now reliably receives its own block of governor limits. Test.startTest() stores your per-transaction limit counters and temporarily resets them to zero. Test.stopTest() restores your limit counters to pre-Test.startTest() values. When your test method finishes, all per-transaction limits reset to zero. Previously, some limits, such as for SOQL queries, didn't always reset inside a Test.startTest()/Test.stopTest() block.

SEE ALSO:

Apex Developer Guide: Using Limits, startTest, and stopTest
Apex Developer Guide: Execution Governors and Limits

## Use @future to Avoid the Dreaded MIXED\_DML\_OPERATION Error in Apex Tests

Mixed Data Manipulation Language (DML) operations within a single transaction aren't allowed. You can't perform DML on a setup sObject and a non-setup sObject in the same transaction. Instead, you can perform one type of DML as part of an asynchronous job and run the other types in other asynchronous jobs or in the original transaction. This alternative is widely used. However, when this alternative was used within the context of an Apex test, errors still resulted. We've fixed this bug.

This example previously didn't work in a test context, but now it does. UserAndContactTest.testUserAndContact() calls the future method InsertFutureUser.insertUser() to insert a user.

UserAndContactTest.testUserAndContact() then inserts a contact.

```
public class InsertFutureUser {
    @future
    public static void insertUser() {
        Profile p = [SELECT Id FROM Profile WHERE Name='Standard User'];
```

SEE ALSO:

Apex Developer Guide: Mixed DML Operations in Test Methods

Apex Developer Guide: sObjects That Cannot Be Used Together in DML Operations

## Compare Currency to Decimals in Apex Tests

We've fixed a bug that caused an exception to be thrown when comparing a Currency value to a Decimal value in an Apex test. You can now use data silos that contain both Currency values and Decimal values and compare these data types to your heart's content.

## **Test WSDL-Based Asynchronous Callouts**

Previously, you could test synchronous WSDL-based callouts, or you could test asynchronous non-WSDL-based callouts. But testing asynchronous callouts made from an imported WSDL caused your tests to fail with an internal Salesforce error. We've fixed this bug.

SEE ALSO:

Apex Developer Guide: Making an Asynchronous Callout from an Imported WSDL

## Locate Jobs in the Apex Flex Queue

You can now query the FlexQueueltem object to find the position of an asynchronous Apex job in the flex queue. Thanks to the FlexQueueltem object's AsyncApexJobId field, your query can also include fields from the AsyncApexJob object. Include AsyncApexJob fields in your query to get information such as the job's creation date or details about the Apex class to be executed.

To find the position of an AsyncApexJob in the flex queue, query JobPosition. For example:

```
SELECT JobPosition FROM FlexQueueItem WHERE JobType = 'BatchApex' AND AsyncApexJobId = '707xx00000DABC'
```

To find the job at a given position, query AsyncApexJobId. For example:

```
SELECT AsyncApexJobId FROM FlexQueueItem WHERE JobType = 'BatchApex' AND JobPosition = '2'
```

To find all batch jobs in the flex queue, query JobType. To get other information about the jobs, include AsyncApexJob in your query. For example:

```
SELECT JobType, JobPosition, AsyncApexJob.ApexClass.Name, AsyncApexJob.CreatedDate, AsyncApexJob.CreatedBy FROM FlexQueueItem WHERE JobType='BatchApex' AND AsyncApexJob.ApexClass.Name LIKE '%'BatchAJob'%' ORDER BY JobPosition DESC
```

#### SEE ALSO:

SOAP API Developer Guide: FlexQueueltem

SOAP API Developer Guide: AsyncApexJob

Apex Developer Guide: FlexQueue Class

Salesforce Help: Monitoring the Apex Flex Queue

## Test Performance Gains with Platform Cache Trials

You can now request trial cache space to test performance improvements by using Platform Cache in your applications. Enterprise, Unlimited, and Performance editions come with some cache, but adding more cache often provides greater performance. When your trial request is approved, you can allocate capacity to partitions and experiment with using the cache for different scenarios. Testing the cache on a trial basis lets you make an informed decision about whether to purchase cache. This feature is available in Salesforce Classic only.

Salesforce usually approves trial cache requests in three days. When your request is approved, you receive 30 MB of trial cache space (10 MB if you have Developer Edition). If you need more trial cache space, contact Salesforce.



Note: You can make up to 10 trial cache requests, and you must wait 90 days between trials.

After you request trial cache, you receive emails at the following intervals.

## At activation

You can now allocate capacity to partitions and test the trial cache in your org.

## Three days before expiration

Before expiration, be sure to reconfigure your partitions to deallocate the added trial space.

## At expiration

The trial cache is removed from your org.



Note: If you haven't deallocated enough space, Salesforce reduces your partition sizes to remove the granted trial cache space.

You can request trial cache for a Developer Edition org. After you sign up for the org, request trial cache from the Platform Cache Partition tool. ISVs who are using Developer Edition orgs to create managed packages can get 10 MB of trial cache for up to two Developer Edition orgs. ISVs can contact their Salesforce representative to get trial cache in Developer Edition orgs.

## SEE ALSO:

Salesforce Help: Define Partitions for Data Cached with Force.com Platform Cache Apex Developer Guide: Platform Cache

## Purchase Platform Cache

You can now purchase Platform Cache space, which can significantly improve performance of your applications. This feature is available in Salesforce Classic only.

Platform Cache is available to customers with Enterprise Edition orgs and above. The following editions come with some default cache space, but often, adding more cache gives even greater performance enhancements.

- Enterprise Edition (10 MB by default)
- Unlimited Edition (30 MB by default)
- Performance Edition (30 MB by default)

To determine how much cache would be beneficial to your applications, you can request trial cache and try it out in your org. Platform Cache can improve performance in the following situations, among many others.

- Orgs with a large amount of Apex customization
- Orgs with large numbers of concurrent users
- Orgs or applications with complex calculations or queries

In addition, ISVs can purchase cache for use with the applications they provide to customers.

Cache space is sold in 10-MB blocks, with an annual subscription. To purchase Platform Cache, contact your Salesforce representative.

## SEE ALSO:

Salesforce Help: Define Partitions for Data Cached with Force.com Platform Cache Apex Developer Guide: Platform Cache

## Make Calls to PageReference.getContent() After DML and Savepoints

We've further relaxed the restrictions on calling getContent() and getContentAsPdf() after performing DML operations to include creating Savepoints. If the calls to getContent() and getContentAsPdf() are internal calls, they're now allowed.

Supporting Savepoints was a notable exception to the increased usability of PageReference.getContent() in Winter '16. We're excited to include it in this release, and we hope it removes the last barrier to moving your PDF generation into asynchronous Apex.

## SEE ALSO:

Winter '16 Release Notes: Make Calls to PageReference.getContent() in Asynchronous Apex

## Find the Renamed Apex Developer Guide More Easily

We've renamed the Force.com Apex Code Developer's Guide to the Apex Developer Guide. On https://developer.salesforce.com/docs, this guide now appears near the top of the alphabetical list in Documentation Version Spring '16 (API version 36.0) and later. We made the change because Apex Developer Guide is easier to remember and type than Force.com Apex Code Developer's Guide—or was it Force.com Apex Developer's Guide, Apex Code Developer's Guide, or Force.com Apex Code Developer Guide? (Yes, people have called it all these things and more.)

You can still find the *Apex Developer Guide* at https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/. If you're a PDF lover, bookmark https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/salesforce\_apex\_language\_reference.pdf to ensure that you always see the latest version.

## New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces

These classes, methods, constants, enumerations, exceptions, and interfaces are new or have changed.

## IN THIS SECTION:

#### **New Apex Classes**

These classes were introduced in this release.

## **Changed Apex Classes**

These existing classes have new or changed methods or constants.

## **New Apex Enums**

These enumerations were introduced in this release.

## New Apex Exception

This exception was introduced in this release.

#### **New Apex Interfaces**

These interfaces were introduced in this release.

## Changed Apex Interfaces

These interfaces were changed in this release.

## **New Apex Classes**

These classes were introduced in this release.

## Classes in the Auth Namespace

#### AuthProviderCallbackState Class

The new Auth.AuthProviderCallbackState class provides request HTTP headers, body, and query parameters for user authentication to the AuthProviderPlugin.handleCallback method. This class allows you to group the information to be passed in rather than passing headers, body, and query parameters individually.

#### AuthProviderTokenResponse Class

The new Auth.AuthProviderTokenResponse class stores the response from the Auth.AuthProviderPlugin.handleCallback method.

#### Classes in the Reports Namespace

## BucketField Class

The new Reports.BucketField class contains methods that describe a bucket field in a report.

## getBucketType()

Returns the bucket type.

## getDevloperName()

Returns the bucket's API name.

## getLabel()

Returns the user-facing name of the bucket.

## getNullTreatedAsZero()

Returns true if null values are converted to the number zero, otherwise returns false.

## getOtherBucketLabel()

Returns the name of fields grouped as Other in buckets of type PICKLIST.

## getSourceColumnName()

Returns the API name of the bucketed field.

## getValues()

Returns the report values grouped by the bucket field.

## setBucketType(value)

Sets the BucketType of the bucket.

#### setBucketType (bucketType)

Sets the BucketType of the bucket.

#### setDevloperName(devloperName)

Sets the API name of the bucket.

#### setLabel(label)

Sets the user-facing name of the bucket.

#### setNullTreatedAsZero (nullTreatedAsZero)

Specifies whether null values in the bucket are converted to zero (true) or not (false).

## setOtherBucketLabel(otherBucketLabel)

Sets the name of the fields grouped as Other (in buckets of BucketType PICKLIST).

#### setSourceColumnName(sourceColumnName)

Specifies the name of the bucketed field.

## setValues(values)

Specifies which type of values are included in the bucket.

## toString()

Returns a string.

#### BucketFieldValue Class

The new Reports.BucketFieldValue class contains information about "bucketed" values in a bucket field.

#### getLabel()

Returns the user-facing name of the bucket category.

#### getRangeUpperBound()

Returns the greatest range limit under which values are included in this bucket category (in buckets of type NUMBER).

## getSourceDimensionValues()

Returns a list of the values from the source field included in this bucket category (in buckets of type PICKLIST and buckets of type TEXT).

#### setLabel(label)

Set the user-facing name of the bucket category.

## setRangeUpperBound(rangeUpperBound)

Sets the greatest limit of a range under which values are included in this bucket category (in buckets of type NUMBER).

#### setSourceDimensionValues(sourceDimensionValues)

Specifies the values from the source field included in this bucket category (in buckets of type PICKLIST and buckets of type TEXT).

#### toString()

Returns a string.

#### CrossFilter Class

The new Reports. CrossFilter class contains information about a cross filter.

#### getCriteria()

Returns information about how to filter the relatedEntity. Describes the subset of the relatedEntity which the primary entity is evaluated against.

## getIncludesObject()

Returns true if primary object has a relationship with the relatedEntity, otherwise returns false.

#### getPrimaryEntityField()

Returns the name of the object on which the cross filter is evaluated.

#### getRelatedEntity()

Returns name of the object that the primaryEntityField is evaluated against—the right-hand side of the cross filter.

## getRelatedEntityJoinField()

Returns the name of the field used to join the primaryEntityField and relatedEntity.

#### setCriteria(criteria)

Specifis how to filter the relatedEntity. Relates the primary entity with a subset of the relatedEntity.

## setIncludesObject(includesObject)

Specifies whether objects returned have a relationship with the relatedEntity (true) or not (false).

## setPrimaryEntityField(primaryEntityField)

Specifies the name of the object on which the cross filter is evaluated.

## setRelatedEntity(relatedEntity)

Specifies the name of the object that the primaryEntityField is evaluated against—the right-hand side of the cross filter.

## setRelatedEntityJoinField(relatedEntityJoinField)

Specifies the name of the field used to join the primaryEntityField and relatedEntity.

#### toString()

Returns a string.

#### ReportCsf Class

The new Reports. ReportCsf class contains information about a custom summary formula.

#### getAcrossGroup()

Returns the name of a column grouping when the acrossGroupType is CUSTOM. Otherwise, returns null.

## getAcrossGroupType()

Returns where to display the aggregate.

#### getDecimalPlaces()

Returns the number of decimal places that numbers in the custom summary formula have.

#### getDescription()

Returns the user-facing description of a custom summary formula.

#### getDownGroup()

Returns the name of a row grouping when the downGroupType is CUSTOM. Otherwise, returns null.

## getDownGroupType()

Returns where to display the aggregate of the custom summary formula.

#### getFormula()

Returns the operations performed on values in the custom summary formula.

## getFormulaType()

Returns the formula type.

## getLabel()

Returns the user-facing name of the custom summary formula.

## setAcrossGroup (acrossGroup)

Specifies the column for the across grouping.

## setAcrossGroupType(value)

Sets where to display the aggregate.

## setAcrossGroupType (acrossGroupType)

Sets where to display the aggregate.

#### setDecimalPlaces(decimalPlaces)

Sets the number of decimal places in numbers.

## setDescription(description)

Sets the user-facing description of the custom summary formula.

## setDownGroup (downGroup)

Sets the name of a row grouping when the downGroupType is CUSTOM.

#### setDownGroupType(value)

Sets where to display the aggregate.

## setDownGroupType (downGroupType)

Sets where to display the aggregate.

#### setFormula(formula)

Sets the operations to perform on values in the custom summary formula.

#### setFormulaType(value)

Sets the format of the numbers in the custom summary formula.

## setFormulaType(formulaType)

Sets the format of numbers used in the custom summary formula.

## setLabel(label)

Sets the user-facing name of the custom summary formula.

## toString()

Returns a string.

## TopRows Class

The new Reports. TopRows class describes a row limit filter.

## getDirection()

Returns the sort order of the report rows.

## getRowLimit()

Returns the maximum number of rows shown in the report.

## setDirection(value)

Sets the sort order of the report's rows.

#### setDirection(direction)

Sets the sort order of the report's rows.

#### setRowLimit(rowLimit)

Sets the maximum number of rows included in the report.

## toString()

Returns a string.

## **Changed Apex Classes**

These existing classes have new or changed methods or constants.

## Auth.AuthConfiguration Class

#### **New Method**

#### isCommunityUsingSiteAsContainer()

Returns true if the community uses Site.com pages; otherwise, returns false.

## Auth.SessionManagement Class

#### **New Methods**

## generateVerificationUrl(policy, description, destinationUrl)

Initiates a user identity verification flow with the verification method that the user registered with, and returns a URL to the identity verification screen. For example, if you have a custom Visualforce page that displays sensitive account details, you can prompt the user to verify identity before viewing it.

## getRequiredSessionLevelForProfile(profileId)

Indicates the required login security session level for the given profile.

## validateTotpTokenForKey(totpSharedKey, totpCode, description)

Indicates whether a time-based one-time password (TOTP) code (token) is valid for the given shared key.

## validateTotpTokenForUser(totpCode, description)

Indicates whether a time-based one-time password (TOTP) code (token) is valid for the current user.

## **Changed Methods**

#### validateTotpTokenForKey(sharedKey, totpCode)

Deprecated. Use validateTotpTokenForKey(totpSharedKey, totpCode, description) instead.

## validateTotpTokenForUser(totpCode)

Deprecated. Use validateTotpTokenForUser(totpCode, description) instead.

## Cache.Org Class

#### **New Method**

#### getName()

Returns the name of the default cache partition.

## **New Constant**

## MAX\_TTL\_SECS

The Org class provides a constant that you can use when setting the time-to-live (TTL) value.

#### Cache.Session Class

#### **New Method**

#### getName()

Returns the name of the default cache partition.

## **New Constant**

### MAX TTL SECS

The Session class provides a constant that you can use when setting the time-to-live (TTL) value.

## QuickAction.QuickActionResult Class

#### **New Method**

#### getSuccessMessage()

Returns the success message associated with the quick action.

## Reports.ReportMetadata Class

#### **New Methods**

#### getBuckets()

Returns a list of bucket fields in the report.

## getCrossFilters()

Returns information about cross filters applied to a report.

#### getCustomSummaryFormula()

Returns information about custom summary formulas in a report.

## getTopRows()

Returns information about a row limit filter, including the number of rows returned and the sort order.

#### setBuckets (buckets)

Creates bucket fields in a report.

#### setCrossFilters(crossFilters)

Applies cross filters to a report.

## setCustomSummaryFormula(customSummaryFormula)

Adds a custom summary formula to a report.

### setTopRows (topRows)

Applies a row limit filter to a report.

## System.SandboxPostCopy Class

#### **New Method**

#### runApexClass

To make your sandbox environment business ready, automate data manipulation or business logic tasks. At sandbox creation, specify a single Apex class to perform the tasks. This class executes every time the sandbox is copied, and provides context for org ID, sandbox ID, and sandbox name.

## System.Approval Class

## **New Methods**

## isLocked(id)

Returns true if the record with the ID id is locked, or false if it's not.

#### isLocked(ids)

Returns a map of record IDs and their lock statuses. If the record is locked the status is true. If the record is not locked the status is false.

#### isLocked(sobject)

Returns true if the sobject record is locked, or false if it's not.

#### isLocked(sobjects)

Returns a map of record IDs to lock statuses. If the record is locked the status is true. If the record is not locked the status is false.

## System. Site Class

## **New Methods**

#### getPasswordPolicyStatement()

Returns the password requirements for a community created with the Napili template.

## isValidUsername(username)

Returns true if the given username is valid; otherwise, returns false.

## validatePassword(user, password, confirmPassword)

Indicates whether a given password meets the requirements specified by org-wide or profile-based password policies in the current user's org.

## System. System Class

#### **New Method**

#### isQueueable()

Returns true if a queueable Apex job invoked the executing code. Returns false if not, including if a batch Apex job or a future method invoked the code.

## **Changed Method**

#### isBatch()

Returns true if a batch Apex job invoked the executing code, or false if not. In API version 35.0 and earlier, also returns true if a queueable Apex job invoked the code.

## System. Test Class

#### **New Method**

## setCreatedDate(recordId, createdDatetime)

Sets CreatedDate for a test-context sObject.

## System. UserInfo Class

## **Changed Methods**

#### getUiTheme()

Returns the preferred theme for the current user. The range of possible return values is expanded to support Salesforce1 and Lightning Experience.

#### getUiThemeDisplayed()

Returns the theme being displayed for the current user. The range of possible return values is expanded to support Salesforce and Lightning Experience.

## **New Apex Enums**

These enumerations were introduced in this release.

## Auth. VerificationPolicy Enum

The Auth.VerificationPolicy enum contains an identity verification policy value used by the SessionManagement.generateVerificationUrl method.

#### Reports.BucketType Enum

The types of values included in a bucket.

#### Reports.CsfGroupType Enum

The group level at which the custom summary format aggregate is displayed in a report.

## Reports.FormulaType Enum

The format of the numbers in a custom summary formula.

## **New Apex Exception**

This exception was introduced in this release.

### Cache Namespace

#### ItemSizeLimitExceededException

Thrown when a cache put call is made with an item that exceeds the maximum size limit.

## **New Apex Interfaces**

These interfaces were introduced in this release.

#### Auth.AuthProviderPlugin Interface

Use AuthProviderPlugin to create a custom OAuth-based authentication provider plug-in for single sign-on to Salesforce.

#### getCustomMetadataType()

Returns the custom metadata type API name for a custom OAuth-based authentication provider for single sign-on to Salesforce.

## getUserInfo(authProviderConfiguration, response)

Returns information from the custom authentication provider about the current user. This information is used by the registration handler and in other authentication provider flows.

#### handleCallback(authProviderConfiguration, callbackState)

Uses the authentication provider's supported authentication protocol to return an OAuth access token, OAuth secret or refresh token, and the state passed in when the request for the current user was initiated.

## initiate(authProviderConfiguration, stateToPropagate)

Returns the URL where the user is redirected for authentication.

#### System.SandboxPostCopy Interface

Use SandboxPostCopy to complete tasks after a sandbox is created or refreshed. Create the class with the methods you wish to run, then specify the class when you create a sandbox.

SEE ALSO:

Run Script After Sandbox Creation and Refresh

## **Changed Apex Interfaces**

These interfaces were changed in this release.

#### TxnSecurity.PolicyCondition Interface

The Alert on IP Range Changes example has been removed.

## ConnectApi (Chatter in Apex)

Chatter in Apex includes new and changed Apex classes, input classes, output classes, and enums.

Create custom experiences in Salesforce using Chatter in Apex.

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, it's possible to 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

New and Changed Chatter in Apex Input Classes

New and Changed Chatter in Apex Output Classes

New and Changed Chatter in Apex Enums

## New and Changed Chatter in Apex Classes

## **Announcements**

These methods are in the ConnectApi. Announcements class.

#### **Get announcements**

- getAnnouncements (communityId, parentId) —Get the first page of announcements.
- getAnnouncements (communityId, parentId, pageParam, pageSize) Get the specified page of announcements.

#### Post an announcement

• postAnnouncement (communityId, announcement) — Post an announcement.

## **Chatter Answers**

This method is in the ConnectApi.Zones class.

## Search articles and questions by language

• searchInZone (communityId, zoneId, q, filter, language) — Search a zone by keyword. Specify the language of the results and specify whether to search articles or questions. The language value must be a Salesforce supported locale code.

## Feeds

This method is in the ConnectApi.ChatterFeeds class.

## Attach multiple files that have already been uploaded to Salesforce to a feed post

- To attach up to five already uploaded files to a feed post, use the new postFeedElement(communityId, feedElement) method with the new files property in the ConnectApi.FeedElementCapabilitiesInput class. Attaching multiple files to a comment isn't supported.
  - Important: The postFeedElement(communityId, feedElement, feedElementFileUpload) method is no longer available. In version 36.0 and later, you can't create a feed post and upload a binary file in the same call.

## Groups

These methods are in the ConnectApi. ChatterGroups class.

## Delete a group banner photo

• deleteBannerPhoto(communityId, groupId)—Delete a group banner photo.

Group owners and managers and users with the "Manage All Data" permission can delete group banner photos.

## Get a group banner photo

• getBannerPhoto (communityId, groupId) —Get a group banner photo.

## Set the group banner photo

- setBannerPhoto(communityId, groupId, fileId, versionNumber)—Sets the group banner photo to an already uploaded file.
- setBannerPhoto (communityId, groupId, fileUpload) —Sets the group banner photo to a file that hasn't been uploaded.
- setBannerPhotoWithAttributes (communityId, groupId, bannerPhoto) Sets and crops an already uploaded file as the group banner photo.
- setBannerPhotoWithAttributes (communityId, groupId, bannerPhoto, fileUpload) Sets the group banner photo to a file that hasn't been uploaded and requires cropping.

Group owners and managers and users with the "Manage All Data" permission can set group banner photos.

#### Guest users can access member information

If your community allows access without logging in, these methods are available to guest users. These methods return information that the quest user has access to.

- getMembers (communityId, groupId) —Get the first page of information about members of a group.
- getMembers (communityId, groupId, pageParam, pageSize) —Get the specified page of information about members of a group.

## Knowledge

These methods are in the new ConnectApi. Knowledge class.

## Get trending articles for a community

getTrendingArticles(communityId, maxResults)—Get trending articles for a community.

This method has a matching set test method.

#### Get trending articles for a topic in a community

• getTrendingArticlesForTopic(communityId, topicId, maxResults)—Get the trending articles for a topic in a community.

This method has a matching set test method.

## Recommendations

These methods are in the ConnectApi.Recommendations class.

Community managers (users with the "Create and Set Up Communities" or "Manage Communities" permission) can access, create, and delete recommendation audiences, recommendation definitions, and scheduled recommendations in their communities. Users with the "Modify All Data" permission can also access, create, and delete recommendation audiences, recommendation definitions, and scheduled recommendations.

#### Get a user's recommendations

- getRecommendationsForUser(communityId, userId, contextAction, contextObjectId, maxResults, channel)—Returns the user, group, file, record, topic, custom, and static recommendations for the context user
- getRecommendationsForUser(communityId, userId, action, contextAction, contextObjectId, maxResults, channel)—Returns the recommendations for the context user for the specified action
- getRecommendationsForUser(communityId, userId, action, objectCategory, contextAction, contextObjectId, maxResults, channel)—Returns the recommendations for the context user for the specified action and object category.

Each method has a matching set test method.

#### Get scheduled recommendations

getScheduledRecommendations (communityId, channel) —Get scheduled recommendations.

#### Create scheduled recommendations

 createScheduledRecommendation(communityId, recommendationDefinitionId, rank, enabled, recommendationAudienceId, channel)—Create a scheduled recommendation with the specified parameters.

## Recommendation methods no longer available

Because of the five new recommendation methods, these recommendation methods are no longer available:

- getRecommendationsForUser(communityId, userId, contextAction, contextObjectId, maxResults) and its matching set test method
- getRecommendationsForUser(communityId, userId, action, contextAction, contextObjectId, maxResults) and its matching set test method
- getRecommendationsForUser(communityId, userId, action, objectCategory, contextAction, contextObjectId, maxResults) and its matching set test method
- getScheduledRecommendations(communityId)
- createScheduledRecommendation(communityId, recommendationDefinitionId, rank, enabled, recommendationAudienceId)

#### **Get topic recommendations**

Topic recommendations are available only in communities.

Use these existing methods to get topic recommendations.

- getRecommendationForUser(communityId, userId, action, objectId)—Returns the recommendation for the context user for the specified action and object ID.
- getRecommendationsForUser(communityId, userId, contextAction, contextObjectId, maxResults, channel)—Returns the user, group, file, record, topic, custom, and static recommendations for the context user.
- getRecommendationsForUser(communityId, userId, action, contextAction, contextObjectId, maxResults, channel)—Returns the recommendations for the context user for the specified action.
- getRecommendationsForUser(communityId, userId, action, objectCategory, contextAction, contextObjectId, maxResults, channel)—Returns the recommendations for the context user for the specified action and object category.

Each method has a matching set test method.

## Reject a topic recommendation

Use this existing method to reject a topic recommendation.

• rejectRecommendationForUser(communityId, userId, action, objectId)—Rejects the recommendation for the context user for the specified action and object ID.

## **Topics**

This method is in the ConnectApi. Topics class.

## Create a topic

• createTopic (communityId, name, description) — Creates a topic. Only users with the "Create Topics" permission can create a topic.

## **UserProfiles**

These methods are in the ConnectApi. UserProfiles class.

## Delete a user banner photo

deleteBannerPhoto (communityId, userId) — Delete a user banner photo.

## Get a user banner photo

• getBannerPhoto(communityId, userId)—Get a user banner photo.

## Set the user banner photo

- setBannerPhoto(communityId, userId, fileId, versionNumber)—Set the user banner photo to an already uploaded file.
- setBannerPhoto (communityId, userId, fileUpload) Set the user banner photo to a file that hasn't been uploaded.
- setBannerPhotoWithAttributes (communityId, userId, bannerPhoto) Set and crop an already uploaded file as the user banner photo.
- setBannerPhotoWithAttributes (communityId, userId, bannerPhoto, fileUpload)—Set the user banner photo to a file that hasn't been uploaded and requires cropping.

## New and Changed Chatter in Apex Input Classes

#### **Announcements**

## ConnectApi.AnnouncementInput

This input class has these new properties:

- feedItemId—ID of an AdvancedTextPost feed item that is the body of the announcement.
- isArchived—Specifies whether the announcement is archived.
- parentId—ID of the parent entity for the announcement, that is, a group ID when the announcement appears in a group.
- sendEmails—Specifies whether the announcement is sent as an email to all group members regardless of their email setting for the group. If Chatter emails aren't enabled for the organization, announcement emails aren't sent. Default value is false.

## **Feeds**

### ConnectApi.FeedElementCapabilitiesInput

This input class has one new property, files, which describes files attached to a feed element. The content property is no longer available for feed posts. Use the files property to attach already uploaded files to feed posts.

Important: In version 36.0 and later, you can't create a feed post and upload a binary file in the same call. Upload files to Salesforce first, and then use these new input classes and properties to attach one or more files to the feed post.

#### ConnectApi.FileIdInput

This new input class has these properties:

- id—ID of a file that has already been uploaded.
- operationType—Specifies the operation to carry out on the file.
  - Add—Adds the file to the feed element.
  - Remove—Removes the file from the feed element.

#### ConnectApi.FilesCapabilityInput

This new input class has one property, items, which is a list of file IDs and the operations to be carried out on those files.

## Groups

## ConnectApi.BannerPhotoInput

This new input class has these properties:

- cropHeight—Height of the crop rectangle in pixels.
- cropWidth—Width of the crop rectangle in pixels.
- cropX—X position of the crop rectangle from the left edge of the image in pixels. Top left is position (0,0).
- cropY—Y position of the crop rectangle from the top edge of the image in pixels. Top left is position (0,0).
- fileId—ID of an existing file. The key prefix must be 069, and the file size must be less than 8 MB.
- versionNumber—Version number of an existing file. If not provided, the latest version is used.

#### **Recommendations**

#### ConnectApi.AudienceCriteriaInput

This new input class is abstract and is a superclass for ConnectApi.CustomListAudienceCriteriaInput and ConnectApi.NewUserAudienceCriteriaInput.ConnectApi.AudienceCriteriaInput has one property, type, which specifies the recommendation audience criteria type as one of these values:

- CustomList—A custom list of users makes up the audience.
- MaxDaysInCommunity—New community members make up the audience.

## ${\tt ConnectApi.CustomListAudienceCriteriaInput}$

This new input class has these properties:

- memberOperationType—The operation to carry out on the audience members.
- members—A collection of user IDs.

## ConnectApi.NewUserAudienceCriteriaInput

This new input class has one property, value, which is the maximum number of days since a user became a community member.

## ConnectApi.RecommendationAudienceInput

This input class has one new property, criteria, which is the criteria for either the custom list or the new members recommendation audience type.

This input class no longer supports the memberOperationType and members properties. In version 36.0 and later, use the memberOperationType and members properties, respectively, in

ConnectApi.CustomListAudienceCriteriaInput.

## ConnectApi.ScheduledRecommendationInput

This input class has one new property, channel, which ties recommendations together. For example, display recommendations in specific places in the UI or show recommendations based on time of day or geographic locations.

#### **User Profiles**

## ConnectApi.BannerPhotoInput

This new input class has these properties:

- cropHeight—Height of the crop rectangle in pixels.
- cropWidth—Width of the crop rectangle in pixels.
- cropx—X position of the crop rectangle from the left edge of the image in pixels. Top left is position (0,0).
- cropY—Y position of the crop rectangle from the top edge of the image in pixels. Top left is position (0,0).
- fileId—ID of an existing file. The key prefix must be 069, and the file size must be less than 8 MB.
- versionNumber—Version number of an existing file. If not provided, the latest version is used.

## New and Changed Chatter in Apex Output Classes

## **Announcements**

## Announcement

This output class has these new properties:

- isArchived—Specifies whether the announcement is archived.
- sendEmails—Specifies whether the announcement is sent as an email to all group members.

## Case Feed Emails

#### ConnectApi.EmailAddress

This output class has one new property, relatedRecord, which is the summary of a related record, such as a contact or user.

#### ConnectApi.EmailAttachment

This new output class has these properties:

- attachment—Record summary of the attachment.
- contentType—Type of attachment.
- fileName—Name of the attachment.

## ConnectApi.EmailMessageCapability

This output class has these new properties:

- attachments—The attachments in the email message.
- bccAddresses—The BCC addresses for the email message.

- body—The body of the email message.
- ccAddresses—The CC addresses for the email message.
- fromAddress—The From address for the email message.
- isRichText—Indicates whether the body of the email message is in rich text format.

This output class no longer supports the textbody property. In version 36.0 and later, use the body property.

## Communities

#### ConnectApi.Community

This output class has one new property, loginUrl, which is the login URL for the community.

#### **Feeds**

## ConnectApi.Content

This new output class has these properties:

- checksum—MD5 checksum for the file.
- contenturl—URL of the content for links.
- description—Description of the attachment.
- downloadUrl—URL to the content.
- fileExtension—Extension of the file.
- fileSize—Size of the file in bytes. If size can't be determined, returns unknown.
- fileType—Type of file, such as PDF.
- hasPdfPreview—true if the file has a PDF preview available; false otherwise.
- id—18-character ID of the content.
- isInMyFileSync—true if the file is synced with Salesforce Files Sync.
- mimeType—MIME type of the file.
- renditionUrl—URL to the rendition resource for the file.
- renditionUrl240By180—URL to the 240 x 180 pixel rendition resource for the file.
- renditionUr1720By480—URL to the 720 x 480 pixel rendition resource for the file.
- sharingOption—Sharing option of the file. Values are:
  - Allowed—Resharing of the file is allowed.
  - Restricted—Resharing of the file is restricted.
- textPreview—Text preview of the file if available; null otherwise.
- thumb120By90RenditionStatus—Specifies the rendering status of the 120 x 90 preview image of the file.
- thumb240By180RenditionStatus—Specifies the rendering status of the 240 x 180 preview image of the file.
- thumb720By480RenditionStatus—Specifies the rendering status of the 720 x 480 preview image of the file.
- title—Title of the file.
- versionId—Version ID of the file.

#### ConnectApi.Features

This output class has one new property, maxFilesPerFeedItem, which specifies the maximum number of files that can be added to a feed item.

## ConnectApi.FeedElementCapabilities

This output class has these new properties:

- files—Indicates whether a feed element has attachments.
- socialPost—Indicates whether a feed element can interact with a social post in a social network.

This output class no longer supports the content property. Use the files property.

## ConnectApi.FeedEntityIsEditable

This output class has one new property, areAttachmentsEditableByMe, which indicates whether the context user can add and remove attachments on a feed item or comment.

## ConnectApi.FilesCapability

This new output class is a subclass of ConnectApi. FeedElementCapabilities and has one property, items, which is a collection of files.

## ConnectApi.SocialAccount

This new output class has these properties:

- handle—Social handle, screen name, or alias that identifies this account.
- name—Name of the account as defined by the account's owner.
- profileUrl—URL to the account's profile.

## ConnectApi.SocialPostCapability

This new output class has these properties:

- author—The social account that authored the social post.
- content—The content body of the social post.
- icon—The icon of the social network.
- id—The ID associated with the social post Salesforce record.
- isOutbound—If true, the social post originated from the Salesforce application.
- name—The title or heading of the social post.
- postUrl—The external URL to the social post on the social network.
- provider—The social network that this social post belongs to.
- recipient—The social account that is the recipient of the social post.
- status—The status of the social post.

## ConnectApi.SocialPostStatus

This new output class has these properties:

- message—Status message.
- type—Status type.

## Groups

## ConnectApi.BannerPhoto

This new output class has these properties:

- bannerPhotoUrl—URL to the banner photo in a large format. This URL is available only to authenticated users.
- bannerPhotoVersionId—18-character version ID of the banner photo.
- url—URL to the banner photo.

## ConnectApi.ChatterGroup

This output class has these new properties:

- bannerPhoto—The banner photo for the group.
- isBroadcast—Specifies whether the group is a broadcast group (true) or not (false). In a broadcast group, only group owners and managers can post to the group.

## Knowledge

## ConnectApi.KnowledgeArticleVersion

This new output class has these properties:

- articleType—Type of the knowledge article.
- id—ID of the knowledge article version.
- knowledgeArticleId—ID of the corresponding knowledge article.
- lastPublishedDate—Last published date of the knowledge article.
- summary—Summary of the knowledge article contents.
- title—Title of the knowledge article.
- urlName—URL name of the knowledge article.

#### ConnectApi.KnowledgeArticleVersionCollection

This new output class has one property, items, which is a collection of knowledge article versions.

#### **Recommendations**

## ConnectApi.AudienceCriteria

This new output class is abstract and is a superclass of ConnectApi.CustomListAudienceCriteria and ConnectApi.NewUserAudienceCriteria.ConnectApi.AudienceCriteria has one property, type, which specifies the recommendation audience criteria type as one of these values:

- CustomList—A custom list of users makes up the audience.
- MaxDaysInCommunity—New community members make up the audience.

## ConnectApi.CustomListAudienceCriteria

This new output class has these properties:

- memberCount—Total number of members in the recommendation audience.
- members—The members of the recommendation audience.

#### ConnectApi.NewUserAudienceCriteria

This new output class has one property, maxDaysInCommunity, which is the maximum number of days since a user became a community member.

## ConnectApi.RecommendationAudience

This output class has these new properties:

- criteria—The criteria for the recommendation audience type.
- modifiedBy—User who last modified the recommendation audience.
- modifiedDate—An ISO 8601 format date string, for example, 2011-02-25T18:24:31.000Z.

This output class no longer supports the memberCount and members properties. In version 36.0 and later, these properties are available in ConnectApi.CustomListAudienceCriteria.

## ConnectApi.ScheduledRecommendation

This output class has one new property, channel, which ties recommendations together. For example, display recommendations in specific places in the UI or show recommendations based on time of day or geographic locations.

## **Topics**

## ConnectApi. Topic

This output class has one new property, nonLocalizedName, which is the non-localized name of the topic.

## **User Profiles**

#### ConnectApi.BannerPhoto

This new output class has these properties:

- bannerPhotoUrl—URL to the banner photo in a large format. This URL is available only to authenticated users.
- bannerPhotoVersionId—18-character version ID of the banner photo.
- url—URL to the banner photo.

#### ConnectApi.UserDetail

This output class has one new property, bannerPhoto, which is the user's banner photo.

## Wave

#### ConnectApi.Features

This output class has one new property, wave, which indicates whether Wave is enabled.

## New and Changed Chatter in Apex Enums

For complete information about these enums, see ConnectApi Enums in the Apex Developer Guide.

## ConnectApi.FeedElementCapabilityType

This enum has these new values:

- Files—Indicates whether the feed element has one or more file attachments.
- SocialPost—Indicates whether the feed element can interact with a social post on a social network.

## ConnectApi.OperationType

Specifies the operation to carry out on the file.

- Add—Adds the file to the feed element.
- Remove—Removes the file from the feed element.

## ${\tt ConnectApi.RecommendationAudienceCriteriaType}$

Specifies the recommendation audience criteria type.

- CustomList—A custom list of users makes up the audience.
- MaxDaysInCommunity—New community members make up the audience.

#### ConnectApi.RecommendationChannel

Specifies a way to tie recommendations together, for example, to display recommendations in specific places in the UI or to show recommendations based on time of day or geographic locations.

• CustomChannell—Custom recommendation channel. Not used by default. Work with your community manager to define custom channels. For example, community managers can use Community Builder to determine where recommendations appear.

- CustomChannel2—Custom recommendation channel. Not used by default. Work with your community manager to define custom channels.
- CustomChannel3—Custom recommendation channel. Not used by default. Work with your community manager to define custom channels.
- CustomChannel 4—Custom recommendation channel. Not used by default. Work with your community manager to define custom channels.
- CustomChannel5—Custom recommendation channel. Not used by default. Work with your community manager to define custom channels.
- DefaultChannel—Default recommendation channel. Recommendations appear by default on the Napili community home and question detail pages and in the feed in communities in the Salesforce1 mobile browser app. They also appear anywhere community managers add recommendations using Community Builder in communities using the Summer '15 or later version of the Napili template.

## ConnectApi.RecommendationExplanationType

This enum has these new values:

- TopicFollowedTogether—Topics often followed together with the record the context user just followed
- TopicFollowedTogetherWithFollowees—Topics often followed together with other records the context user follows
- TopicPopularFollowed—Topics that have many followers
- TopicPopularLiked—Topics on posts that have many likes

#### ConnectApi.RecommendationType

This enum has one new value, topics, because topics can now be recommended.

#### ConnectApi.SocialNetworkProvider

Specifies the social network provider.

- Facebook
- GooglePlus
- Instagram
- Line
- LinkedIn
- Other
- Pinterest
- SinaWeibo
- Twitter
- VKontakte
- WeChat
- WhatsApp
- YouTube

## ConnectApi.SocialPostStatusType

Specifies the current state of the social post.

- ApprovalPending
- ApprovalRecalled
- ApprovalRejected

- Deleted
- Failed
- Pending
- Replied
- Sent
- Unknown

## **Lightning Components**

The Lightning Component framework powers Lightning Experience and Salesforce 1. Use the framework to build mobile apps and pages in Lightning Experience, Salesforce 1, Salesforce Classic, and Communities. Enhancements this release are focused on toolkit robustness. This release also offers early access to new capabilities for deploying Lightning Components apps in non-Salesforce containers, new visual design tools, and more sophisticated label formatting.

Use out-of-the-box components or build your own components with JavaScript, HTML, CSS, Apex, or any web-enabled code.

The AppExchange for Components enables you to install components created by Salesforce partners or publish your own components.

For more information, refer to the *Lightning Components Developer Guide*.

#### IN THIS SECTION:

## Run Lightning Components Apps Anywhere with Lightning Out (Beta)

Whether it's a Node.js app running on Heroku, a department server inside the firewall, or even SharePoint, build your custom app with Force.com and run it wherever your users are.

## Capture Design Variables with Lightning Components Tokens (Developer Preview)

Capture the essential values of your visual design into named tokens. Define the token values once and reuse them throughout your Lightning components CSS resources. Tokens make it easy to ensure that your design is consistent, and even easier to update it as your design evolves.

## Don't Ignore Browser Console Warnings for Access Check Violations!

In Spring '16, if you access a resource, such as a component or attribute, that doesn't have an access system attribute allowing you to access it, you see a warning in your browser console if you've enabled debug mode. The framework will enforce these access checks more strictly in the Summer '16 release so you shouldn't ignore them. Otherwise, your code will break when Summer '16 rolls out. Nobody wants that!

## Debug Lightning Components with the Salesforce Lightning Inspector

The Salesforce Lightning Inspector is a Google Chrome DevTools extension that helps you debug Lightning components and profile component performance.

## Dynamically Populate Label Parameters with format()

The first parameter of format () is a custom label referring to a string that can contain placeholders. The placeholders are replaced at runtime by the substitution values passed as subsequent parameters. Add as many parameters as you need. The parameters are numbered and zero-based.

## Improved Performance with Secure Client-Side Caching

We've added secure data caching in the browser to improve page reload performance by avoiding additional round trips to the server. This feature is available in Lightning Experience only.

## **EDITIONS**

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.

## \$A.error() Is Deprecated

We deprecated \$A.error() in favor of the standard JavaScript Error object that is more widely known to developers.

## Sfdc JavaScript Global Is Removed

Sfdc is a JavaScript utility object available in the global scope in Salesforce application containers. It's an internal-to-Salesforce implementation detail, and its use by customers has never been supported or documented. It's no longer added to Lightning-specific containers, and you should remove it from your Lightning Components code.

## Resolved Errors with Apex Controllers with List or Map Parameters

In previous releases, if your Lightning component called a server-side Apex controller method and sent a List or Map object as a parameter, it could result in an UnsupportedOperationException error. This issue is resolved.

## **Lightning Components**

Components help you build apps faster. Use them in your Lightning apps or in Salesforce 1.

#### SEE ALSO:

Lightning Components Developer Guide

## Run Lightning Components Apps Anywhere with Lightning Out (Beta)

Whether it's a Node.js app running on Heroku, a department server inside the firewall, or even SharePoint, build your custom app with Force.com and run it wherever your users are.



**Note:** This release contains a beta version of Lightning Out, which means it's a high quality feature with known limitations. You can provide feedback and suggestions for Lightning Out on the IdeaExchange.

Lightning Out is the technology that powers Lightning Components for Visualforce, now available in the "full strength" version. The process for using Lightning Out outside of Visualforce is comparably simple.

- 1. Setup and preparation.
- **2.** Create a reference to a Lightning Components app that includes dependency information about the components you intend to use.
- **3.** Create components on the page to build the page's functionality.

Setup is more involved than with Lightning Components for Visualforce, because Lightning Out isn't running inside a Salesforce container. You manually handle services that are provided automatically when running inside Salesforce. For example, your client code needs to explicitly manage authentication and session initialization, either with your own code or using a library such as ForceJS.

There's also some setup within Salesforce to allow access to your Lightning Components app. You need to configure the remote site for CORS and create a Connected App with OAuth in Salesforce. This process is the same one that you follow for any for app that connects to Salesforce.

For more details and sample code, see the Lightning Components Developer Guide.

## SEE ALSO:

Lightning Components Developer Guide: Add Lightning Components to Any App with Lightning Out (Beta) Idea Exchange: Lightning Components Anywhere / Everywhere

## Capture Design Variables with Lightning Components Tokens (Developer Preview)

Capture the essential values of your visual design into named tokens. Define the token values once and reuse them throughout your Lightning components CSS resources. Tokens make it easy to ensure that your design is consistent, and even easier to update it as your design evolves.

To create a tokens bundle for your org's namespace, do the following.

- 1. In the Developer Console, select File > New > Lightning Tokens.
- 2. Name the tokens bundle defaultTokens.
  - Note: In this developer preview of tokens, you can only create one tokens bundle, and the only allowed bundle name is defaultTokens. The tokens defined within it are automatically accessible in your Lightning components.

You now have an empty tokens bundle, ready to edit.

```
<aura:tokens>
</aura:tokens>
```

**3.** An individual token is a name-value pair that you specify using the <aura:token> component. Add new tokens as child components of the bundle's <aura:tokens> component. For example:

Tokens created in your defaultTokens bundle are automatically available in components in your namespace. To use a design token, reference it using the token () function and the token name in the CSS resource of a component bundle. For example:

```
.THIS p {
    font-family: token(myBodyTextFontFace);
    font-weight: token(myBodyTextFontWeight);
}
```

## Standard Design Tokens

Salesforce exposes a set of "base" tokens that you can access in your component style resources.

To add the standard tokens to your org, you extend your org's tokens bundle from the base tokens, like so.

```
<aura:tokens extends="force:base">
    <!-- your own tokens here -->
</aura:tokens>
```

Once added to defaultTokens, you can reference tokens from force:base just like your own tokens, using the token() function and token name. For example:

```
.THIS p {
    font-family: token(fontFamily);
    font-weight: token(fontWeightRegular);
}
```

You can mix-and-match your tokens with the standard tokens. Using tokens available from force:base allows you to mimic the look-and-feel of the Salesforce Lightning Design System (SLDS) in your own custom components. As the SLDS evolves, components that use the standard design tokens will evolve along with it.

See the Lightning Components Developer Guide for more details, including a list of Salesforce standard design tokens currently available.

SEE ALSO:

Lightning Components Developer Guide

## Don't Ignore Browser Console Warnings for Access Check Violations!

In Spring '16, if you access a resource, such as a component or attribute, that doesn't have an access system attribute allowing you to access it, you see a warning in your browser console if you've enabled debug mode. The framework will enforce these access checks more strictly in the Summer '16 release so you shouldn't ignore them. Otherwise, your code will break when Summer '16 rolls out. Nobody wants that!

You can control access to your applications, interfaces, components, attributes, and events via the access system attribute on these tags:

- aura:application
- aura:interface
- aura:component
- aura:attribute
- aura:event

The default value for these resources is access="public", which means the resources are available only within the same namespace.

This sample component has global access.

```
<aura:component access="global">
...
</aura:component>
```

For more information about the access system attribute, see the Lightning Components Developer Guide.

## Fixing Access Check Warnings

You can fix any access check warnings using one or more of these techniques.

- Add appropriate access system attributes to the resources that you own.
- Remove references in your code to resources that aren't available.
- Ensure that any attribute that you're accessing exists and you're using the correct case-sensitive spelling.

Accessing an undefined attribute or a private attribute triggers the same access violation message because the access context doesn't know whether the attribute is undefined or private.

• Use \$A.getCallback() to wrap code that accesses a component outside the normal rerendering lifecycle, such as in a setTimeout() or setInterval() call or in an ES6 Promise.

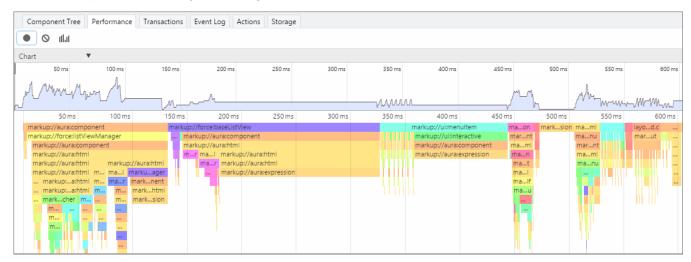
\$A.getCallback() preserves the current execution context and grants the correct access level to the asynchronous code. Otherwise, the framework loses context and allows access only to global resources.

## Debug Lightning Components with the Salesforce Lightning Inspector

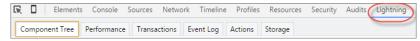
The Salesforce Lightning Inspector is a Google Chrome DevTools extension that helps you debug Lightning components and profile component performance.

Debugging can be difficult! The Salesforce Lightning Inspector gives you more insight into what's happening under the covers when you're developing Lightning components.

- Navigate the component tree in your app, inspect components and their associated DOM elements.
- Identify performance bottlenecks by looking at a graph of component creation time.
- Debug server interactions faster by monitoring and modifying responses.
- Test the fault tolerance of your app by simulating error conditions or dropped action responses.
- Track the sequence of event firing and handling for one or more actions.



The Chrome extension adds a Lightning tab to the DevTools menu. There are several sub tabs available to inspect different aspects of your app.



For details on use and installation, see the *Lightning Components Developer Guide*.

## Dynamically Populate Label Parameters with format()

The first parameter of format () is a custom label referring to a string that can contain placeholders. The placeholders are replaced at runtime by the substitution values passed as subsequent parameters. Add as many parameters as you need. The parameters are numbered and zero-based.

For example, if you have three parameters, they are named {0}, {1}, and {2}, and they are substituted in the order they're specified. Let's look at a custom label, \$Label.c.myLabel, with a value of Hello {0} and {1}, where \$Label is the global value provider that accesses your labels.

This expression in markup dynamically populates the placeholder parameters with the values of the supplied attributes.

```
{!format($Label.c.myLabel, v.attribute1, v.attribute2)}
```

The label is refreshed if one of the attribute values changes.

In JavaScript, use the equivalent \$A.util.format() method.

For more information about custom labels, see Custom Labels.

## Improved Performance with Secure Client-Side Caching

We've added secure data caching in the browser to improve page reload performance by avoiding additional round trips to the server. This feature is available in Lightning Experience only.

You don't have to do anything to avail of this performance improvement in Lightning Experience.

We don't recommend disabling this setting but if your company's policy doesn't allow browser caching even if the data is encrypted, you can disable it.

- 1. From Setup, enter Session Settings in the Quick Find box.
- 2. Deselect the Enable secure and persistent browser caching to improve performance checkbox.
- 3. Click Save.

## \$A.error() Is Deprecated

We deprecated \$A.error() in favor of the standard JavaScript Error object that is more widely known to developers.

Use throw new Error ("Your error message here") for unrecoverable errors, such as an error that prevents your app from starting successfully. The error message is displayed.

## sfac JavaScript Global Is Removed

Sfdc is a JavaScript utility object available in the global scope in Salesforce application containers. It's an internal-to-Salesforce implementation detail, and its use by customers has never been supported or documented. It's no longer added to Lightning-specific containers, and you should remove it from your Lightning Components code.

The sole exception is the official Force.com Canvas API, which is available using the Sfdc.canvas object. Canvas APIs as documented in the Canvas Developer Guide remain available and are fully supported.



Note: The Sfdc global remains available in the Visualforce container, and Visualforce code is unaffected.

If your Lightning components are used, for example, within a Visualforce page using Lightning Components for Visualforce, they continue to have access to the Sfdc global. This use is unsupported, and these Lightning components might not be portable to other contexts.

If your components must have access to values obtained from the Sfdc global, it's a best practice to use JavaScript in Visualforce to obtain those values. Then pass them into the Lightning component using attributes or events, rather than accessing them directly within the component. This technique allows your Lightning components to be portable, as these values can be obtained using an appropriate mechanism based on the container.

## Resolved Errors with Apex Controllers with List or Map Parameters

In previous releases, if your Lightning component called a server-side Apex controller method and sent a List or Map object as a parameter, it could result in an UnsupportedOperationException error. This issue is resolved.

We don't normally describe items in a release note when the change is merely a defect correction. But this one could result in some awkward workarounds. We thought you'd like to know.

## **Lightning Components**

Components help you build apps faster. Use them in your Lightning apps or in Salesforce 1.

## **New Components**

The following component is new.

## forceChatter:fullFeed

The forceChatter:fullFeed component is used with Lightning Out (Beta) and reserved for future use. This is a beta component. You can't use forceChatter:fullFeed inside Salesforce1, Lightning Experience, or in communities that use Lightning-compatible templates. Using forceChatter:fullFeed in any of these causes duplicate posts because the component handles events in each in different ways.

## ΔΡΙ

Access more metadata types and data objects in API version 36.0.

#### IN THIS SECTION:

## Retirement of Endpoint Routing for API Logins

We're changing our endpoint routing to deliver better performance and higher availability for our dedicated API endpoints. Previously, you could use www.salesforce.com as an API login

endpoint, which then routed you to the correct login instance. As of January 1, 2016, we are removing internal routing, and you must change your API login endpoints from www.salesforce.com to https://login.salesforce.com. This change applies only to API login traffic. Logging in from a browser by clicking **login** still works.

## New, Changed, and Retired Objects

These objects are new, changed, or retired.

#### **SOOL**

Salesforce Object Query Language (SOQL) includes a new query scope, enhanced support for the DISTANCE and convertCurrency functions, and improved formatting for number, date, time, and currency fields.

#### **REST API**

REST API includes new resources and an intuitive way to construct REST requests.

#### SOAP API

SOAP API includes three changed calls.

## Chatter REST API

Chatter REST API includes new and changed resources, request bodies, and response bodies.

## Reports and Dashboards REST API

The Reports and Dashboards REST API now returns information about filters, buckets, and custom summary formulas.

#### Data.com API

We've improved how to count records, added a field, and updated some field properties. The Data.com API provides access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

## Bulk API

Bulk API includes JSON support.

#### Streaming API

Streaming API includes a new feature, Durable Generic Streaming, and a beta feature, Durable PushTopic Streaming, in version 36.0.

#### Tooling AP

Tooling API includes new objects and headers, behavior changes, and enhanced support for a REST resource.



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

#### Metadata API

Metadata API includes updated calls, and new and changed types.

## **Data Services**

Bulk API has been enhanced to handle higher data volumes and Async SOQL supports more commands.

## Salesforce Console API (Integration Toolkit)

The toolkit includes new and updated methods that let you customize a console programmatically. This feature is available in Salesforce Classic only.

## Retirement of Endpoint Routing for API Logins

We're changing our endpoint routing to deliver better performance and higher availability for our dedicated API endpoints. Previously, you could use www.salesforce.com as an API login endpoint, which then routed you to the correct login instance. As of January 1, 2016, we are removing internal routing, and you must change your API login endpoints from www.salesforce.com to https://login.salesforce.com. This change applies only to API login traffic. Logging in from a browser by clicking **login** still works.

## New, Changed, and Retired Objects

These objects are new, changed, or retired.

## IN THIS SECTION:

## **New Objects**

These objects are new.

## **Changed Objects**

These objects have changed.

## **Retired Objects**

This object is retired.

## **New Objects**

These objects are new.

#### **ApexTestSuite**

Represents a suite of Apex classes to include in a test run. A TestSuiteMembership object associates each class with the suite.

## **FeedAttachment**

Represents an attachment to a feed item, such as a file attachment or a link. Use FeedAttachment to add various attachments to one feed item.

## FlexQueueltem

Represents an asynchronous Apex job in the Apex flex queue. Provides information about the job type and flex queue position of the AsyncApexJob.

## LoginEvent

Represents a trackable user login event in your organization. This object is available in API version 36.0 and later.

## NavigationLinkSet

Represents the navigation menu in a community. A navigation menu consists of items that users can click to go to other parts of the community. This object is read-only.

## NavigationMenuItem

Represents a single menu item in a NavigationLinkSet. Use this object to create, delete, or update menu items in your community's navigation menu.

## NavigationMenuItemLocalization

Represents the translated value of a navigation menu item in a community.

## TestSuiteMembership

Represents a class in an ApexTestSuite.

## VerificationHistory

Represents the past six months of your org users' attempts to verify their identity.

#### WorkOrder

Represents a task or series of tasks to be performed, typically in field service. You can use work orders to track work to be performed on assets.

#### WorkOrderFeed

Represents a single feed item on a work order record detail page. A work order feed shows changes to a work order record for fields that are tracked in feeds, and posts and comments about the record.

## WorkOrderHistory

Represents the history of changes to the values in the fields of a work order.

## WorkOrderLineItem

Represents a subtask on a work order, typically in field service.

## WorkOrderLineItemFeed

Represents a single feed item on a work order line item record detail page. A work order line item feed shows changes to a work order line item record for fields that are tracked in feeds, and posts and comments about the record.

#### WorkOrderLineItemHistory

Represents the history of changes to the values in the fields of a work order line item.

## WorkOrderShare

Represents a sharing entry on a work order.

## **Changed Objects**

These objects have changed.

## Changed Objects That Affect Earlier API Versions

This object has changed in API version 36.0 and affects earlier API versions.

#### UserProvisioningConfig

You can now create, update, and delete this object. The following fields are createable and updateable.

- ApprovalRequired
- ConnectedAppId
- DeveloperName
- Enabled
- EnabledOperations
- Language (this field is also now nillable)
- LastReconDateTime

- MasterLabel
- NamedCredentialId
- Notes
- OnUpdateAttributes
- ReconFilter
- UserAccountMapping

## **Changed Objects**

These objects have changed in API version 36.0.

### AgentWork

The AgentWork object has two new fields.

- The PushTimeout field indicates the number of seconds set for push timeout. 0 is returned when push timeout isn't enabled.
- The PushTimeoutDateTime field indicates when the push timeout event occurred.

The AgentWork object has one new status.

The DeclinedOnPushTimeout status indicates that work was declined due to push timeout.

### **Announcement**

The Announcement object has a new field.

The SendEmails field indicates whether to send email notifications to all group members when a Chatter group owner or manager posts an announcement.



Note: This field is currently available to select customers through a pilot program. To be nominated to join this pilot program, contact Salesforce. Additional terms and conditions may apply to participate in the pilot program. Please note that pilot programs are subject to change, and as such, we cannot guarantee acceptance into this pilot program or a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

### Asset

The Asset object has two new fields related to the new option to add hierarchy to assets.

- The Parent Asset field represents an asset's parent asset.
- The read-only Root Asset field represents the top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root could be the same as its parent.

For example, a "hubcap" asset can have a parent asset of "wheel" and a root asset of "automobile."

## AuraDefinition

The DefType field has a new picklist value: TOKENS.

## **AuthProvider**

The AuthProvider object has two new fields related to the new option to create a custom authentication provider plug-in.

- The CustomMetadataTypeRecord field represents the API name of the custom authentication provider.
- The PluginId field represents an existing Apex class that implements the Auth.AuthProviderPlugin interface.

The ProviderType field has a new picklist value: Custom.

### CollaborationGroup

The CollaborationGroup object has two new fields.

- The BannerPhotoUrl field returns the group's banner photo URL.
- The IsBroadcast field indicates whether the group is a broadcast group (true) or not (false).

### DatacloudContact

The following fields are now picklists.

### Department

The department in the company that the contact is affiliated with. The values of this field are fixed enumerated values.

- Engineering
- Finance
- Human Resources
- IT
- Marketing
- Operations
- Other
- Sales
- Support

### Level

A human resource label that designates a person's level in the company. The values of this field are fixed enumerated values.

- C-Level
- VP
- Director
- Manager
- Staff
- Other

The following fields are now groupable.

- companyName
- Department
- Level
- Title

Count(contactId) for DatacloudContact

You can use Count (contactId) to determine how many records are available for certain field values in the DatacloudContact object. GROUP BY is supported for these fields only.

- companyName
- Department
- Level
- Title

There are some limitations when using GROUP BY with the DatacloudContact object.

- DatacloudContact doesn't support grouping multiple fields. Run separate queries for each field.
- DatacloudContact doesn't support the roll-up or cube operators for GROUP BY.

### Query:

```
SELECT Level, Count(ContactId)
FROM DatacloudContact
WHERE State IN ('CA','NV','AZ','OR','WA') AND CompanyName LIKE 'Cisco Systems'
GROUP BY Level
```

## Response:

Returned records 1-5 of 10916 total records in 0.105 seconds:

	Level	Unknown_Field1
1	Staff	5011
2	Manager-Level	4802
3	Director-Level	692
4	VP-Level	244
5	C-Level	167

The following fields are new or updated.

- IsInCRM—Defaulted on create, Sort
- UpdatedDate—Nillable, Sort

## EmailMessage

The ParentId field is now groupable, nillable, and sortable.

### **EmailTemplate**

The EntityType field has a new picklist value that represents campaigns: 701.

### EnvironmentHubMember

The following new fields have been added:

- IsSandbox—Indicates if the member org is a sandbox (true) or not (false).
- ServiceProviderId—Represents the ID of the service provider for a member org.
- SSOMappedUsers—Represents the total number of mapped users in a member org.

The following limits apply:

Daily Limit—You can create up to 20 orgs per day. If you need to create additional orgs, log a case in the Partner Community.

### EventLogFile

A URI\_ID\_DERIVED field has been added to every event type with the URI field. It stores the 18-character ID of the URI of the page that was accessed in the event.

The following fields have been added to Apex Callout events.

- EXEC TIME—The end-to-end execution time of an Apex class or method.
- CALLOUT TIME—The execution time of an external call from Apex.
- QUIDDITY—The type of outer execution associated with the event.

The EXEC TIME field was also added to the Apex Trigger event.

There are also three new event types: Wave Change, Wave Interaction, and Wave Performance.

The Wave Change event type represents route and page changes in the Wave UI.

The Wave Interaction event type represents users' interactions with the Wave UI.

Wave Performance events are performance metrics for queries, lenses, and dashboards.

#### ExternalDataSource

The ApiKey field was removed.

The Protocol field, which is the authentication protocol that's required to access the external system, was added.

### **FeedItem**

The following fields have been removed, and are available in API version 35.0 and earlier only. These fields are no longer in use because content attachments are now created through FeedAttachment.

- ContentData
- ContentDescription
- ContentFileName
- ContentSize
- ContentType

The following relationship field has been added.

#### FeedAttachments

A child relationship field that associates a parent Feedltem record to its FeedAttachment records. FeedAttachment and Feedltem records are linked through the FeedAttachment.FeedEntityId field.

## LiveChatUserConfig

The LiveChatUserConfig object has three new fields.

- The OptionsHasTransferToAgent field specifies whether an agent can transfer a chat directly to a particular agent.
- The OptionsHasTransferToButton field specifies whether an agent can transfer a chat to an agent assigned to a particular chat button.
- The OptionsHasTransferToSkill field specifies whether an agent can transfer a chat to agents assigned to a particular skill,

The OptionsHasChatTransfer field has been removed.

### Network

The Network object includes two new fields:

- AllowedExtensions specifies the types of files allowed in your community.
- MaxFileSizeKb specifies the maximum file size (in KBs) that members can upload in your community.

## OpportunityTeamMember

- The field OpportunityAccessLevel is editable in API version 36.0 and later.
- The field Title was added.

## Organization

The following new fields have been added:

- NamespacePrefix
- SignupCountryIsoCode—Represents the two-character ISO country code specified by the user for a sign-up request.

## PartnerNetworkConnection

The ConnectionStatus field has two new picklist values: ConnectionSuspended and SubscribeInProgress.

### PartnerNetworkSyncLog

The ConnectionEvent field has a new picklist value: SubscribeInProgress.

#### PlatformAction

The ActionListContext field now accepts these new picklist values:

- BannerPhoto—Banner photos are available on profiles in Lightning Experience.
- Dockable—Dockable represents the list of dockable actions. These actions are available from the global create component in Lightning Experience (new task, new event, new note, log a call).
- ListViewDefinition—Returns the corresponding list view that can be created from the API.
- Lookup—Returns the create action expected for creating an object or record from a lookup.

## PresenceUserConfig

The PresenceUserConfig object has one new field.

• The PresenceStatusOnPushTimeoutId provides the ID of the presence status that's automatically assigned to the agent when the agent doesn't respond to work before push timeout occurs.

## QueueRoutingConfig

The QueueRoutingConfig has one new field.

• The PushTimeout field indicates the number of seconds set for push timeout. 0 is returned when push timeout isn't enabled.

## SignupRequest

The Edition field has three new picklist values:

- Group
- Professional
- Enterprise

A new field, SignupSource, was added. This field stores a user-specified description of a trial sign-up, up to 60 characters in length.

#### User

These new fields were added:

- The BannerPhotoUrl field indicates the URL for the user's banner photo.
- The isProfilePhotoActive field indicates whether the user has a profile photo.

### UserPreference

The Preference field has a new picklist value that represents Email Transport Type: 101.

### UserServicePresence

The UserServicePresence object has two new fields.

- The ConfiguredCapacity field indicates the user's total configured capacity.
- The IsAway field indicates whether the user's status is set to Away.

## Default Values for Checkbox and Picklist Fields

The results of describe calls now include the default values for checkbox and picklist fields. As a result, all checkbox fields and several picklist fields had their defaultedOnCreate property set to true. The following picklist fields are affected.

Picklist Field	Affected Objects
AddressInactiveAction	EmailServicesFunction

Picklist Field	Affected Objects
ApprovalStatus	ServiceContract
AssignmentStatus	NetworkMemberGroup
AuthenticationFailureAction	EmailServicesFunction
AuthorizationFailureAction	EmailServicesFunction
AttachmentOption	EmailServicesFunction
BackgroundDirection	Dashboard
BlankValueBehavior	MatchingRuleItem
CanvasAccessMethod	AppMenuItem
Category	Mailmerge Template, Quick Text
Channel	QuickText
ClickjackProtectionLevel	Site
ConnectionType	PartnerNetworkConnection
ContentLocation	ContentVersion
CurrencyIsoCode	All objects that CurrencyIsoCode appears on
DefaultCalendarAccess	Organization
DefaultCurrencyIsoCode	User
DefaultGroupNotificationFrequency	NetworkMember
DeviceFormat	PlatformAction
DigestFrequency	NetworkMember
DisplayType	WebLink
Division	All objects that Division appears on—only applies to Division fields associated with the Division object
FeedbackType	WorkFeedbackQuestionSet, WorkFeedbackRequest
Format	Report
FunctionInactiveAction	EmailServicesFunction
GroupEventType	Event
Language	UserProvisioningConfig
MobileSessionTimeout	ConnectedApplication
OptOutReason	PersonListMember
Origin	ContentVersion

Picklist Field	Affected Objects
OverLimitAction	EmailServicesFunction
PeriodPrefix	FiscalYearSettings
Preference	UserPreference
Priority	ActivityHistory, Case, LookedUpFromActivity, OpenActivity, Question, Task
PublishStatus	ContentDocument, ContentVersion, KnowledgeArticleVersion
QuarterLabel	Period
QuarterPrefix	FiscalYearSettings
RuleStatus	MatchingRule
SharingOption	Attached Content Document, Combined Attachment, Content Document, Content Version
ShowAs	Event
SsoStatus	EnvironmentHubMember
State	Territory2Model
Status	ActivityHistory, EmailMessage, Goal, IdeaTheme, LookedUpFromActivity, Metric, Network, OpenActivity, Quote, SignupRequest, Solution, Task
TagModel	ContentWorkspace
Туре	Dashboard, Entitlement, EntitlementTemplate, PersonList, ProcessDefinition, WorkGoal
UiSkin	Organization
Visibility	NetworkModeration

## **Retired Objects**

This object is retired.

### HashtagDefinition

API access to HashtagDefinition is disabled across all API versions. Any integrations relying on API queries to this object stop working. You can continue to use hashtags in posts and comments, and the hashtags continue to create corresponding topics. We recommend that you redirect all API queries and reports using the HashtagDefinition object to use the Topic object instead. For more information, see Retiring the Legacy HashtagDefinition Object—FAQs.

## **SOQL**

Salesforce Object Query Language (SOQL) includes a new query scope, enhanced support for the DISTANCE and convertCurrency functions, and improved formatting for number, date, time, and currency fields.

## IN THIS SECTION:

## Query Records Saved in All Users' Private Folders with the allPrivate Query Scope

Use the allPrivate query scope to find or delete reports and dashboards saved in all users' private folders. Requires the user permission "Manage All Private Reports and Dashboards."

## DISTANCE() Support with Location-based SOQL Queries

The DISTANCE function is now supported with location-based queries. DISTANCE () now works with location and address fields. You can retrieve a specific distance (say, of a store from a contact's location) and display it to the user.

## Aliasing in SELECT convertCurrency() Statements

The convertCurrency function now supports aliases.

### Formatting for Number, Date, Time, and Currency Fields in SELECT Clauses

These fields now reflect the appropriate format for the given user locale. The field format matches what appears in the Salesforce Classic user interface.

## Query Records Saved in All Users' Private Folders with the allPrivate Query Scope

Use the allPrivate query scope to find or delete reports and dashboards saved in all users' private folders. Requires the user permission "Manage All Private Reports and Dashboards."

For example, this query returns reports saved inside users' private folders that haven't been run in more than one year.

```
SELECT Id FROM Report USING SCOPE allPrivate WHERE LastRunDate < LAST_N_DAYS:365
```

You can also guery reports saved inside a specific user's private folder.

```
SELECT Id FROM Report USING SCOPE allPrivate WHERE OwnerId = '005A0000000Bc2deFG'
```

## **DISTANCE ()** Support with Location-based SOQL Queries

The DISTANCE function is now supported with location-based queries. DISTANCE () now works with location and address fields. You can retrieve a specific distance (say, of a store from a contact's location) and display it to the user.

For example:

```
SELECT Id, Name, Location, DISTANCE(Location, GEOLOCATION(latitude, longitude), 'mi') FROM CONTACT;
```

## Aliasing in SELECT convertCurrency() Statements

The convertCurrency function now supports aliases.

For example:

```
SELECT Id, convertCurrency(AnnualRevenue) convertedCurrency FROM Account
```

## Formatting for Number, Date, Time, and Currency Fields in SELECT Clauses

These fields now reflect the appropriate format for the given user locale. The field format matches what appears in the Salesforce Classic user interface.

This example is for a multi-currency org:

```
SELECT FORMAT(amount) Amt, FORMAT(lastModifiedDate) editDate FROM Opportunity editDate = "7/2/2015 3:11 AM"

Amt = "AED 1,500.000000 (USD 1,000.00)"
```

The SOQL FORMAT function also supports aliasing. You can nest it with aggregate or convertCurrency () functions. For example:

```
SELECT amount, FORMAT(amount) Amt, convertCurrency(amount) editDate,
FORMAT(convertCurrency(amount)) convertedCurrency FROM Opportunity where id = '12345'
SELECT FORMAT(MIN(closedate)) Amt FROM opportunity
```

## **REST API**

REST API includes new resources and an intuitive way to construct REST requests.

## Make the Same Requests Using Fewer API Calls with Friendly URLs

Why make two API calls when you can make just one? A friendly URL provides an intuitive way to construct REST API requests and minimizes the number of round trips between your app and Salesforce org.

Accessing a contact's parent account without a friendly URL involves requesting the contact record using the SObject Rows resource. Then you examine the account relationship field to obtain the account ID and request the account record with another call to SObject Rows. Using a friendly URL, you can access the account in a single call directly from the contact's path:

/services/data/v36.0/sobjects/contact/**id**/account. This functionality is exposed via the new SObject Relationships resource.

## New Resource: Parameterized Search

A new, simple restful search using parameters instead of SOSL clauses is now generally available. A variation of this feature was beta in Winter '16.

URI: /vxx.x/parameterizedSearch/?q=search string

## New Resource: SObject Relationships

Accesses records by traversing object relationships via friendly URLs. You can retrieve, update, or delete the record associated with the traversed relationship field. If there are multiple related records, you can retrieve the complete set of associated records.

URI: /vxx.x/sobjects/sObject/id/relationship field name

## SOAP API

SOAP API includes three changed calls.

# **Changed Calls**

These calls have changed in API version 36.0.

## describeSObjects() and DescribeSObjectResult

The formFactor field has been added. This field represents the environment to which the action override applies. For example, a Large value in this field represents the Lightning Experience desktop environment, and is valid only for Lightning Pages.

The networkScopeFieldName property has been added. This property specifies the API name of the networkScopeField that scopes the entity to a community. For most entities, the value of this property is null.

## performQuickActions() and PerformQuickActionResult

The successMessage field has been added. This field returns the message that displays to the user upon successful completion of the action.

### runTests() and RunTestsRequest

The maxFailedTests field has been added. This field is an optional parameter for the Tooling SOAP API call runTests (). To allow all tests in a run to execute, set maxFailedTests to -1 or don't specify a value. To stop the test run from executing new tests after a given number of tests fail, set maxFailedTests to an integer value from 0 to 1,000,000. This integer value sets the maximum allowable test failures. A value of 0 causes the test run to stop if any failure occurs. A value of 1 causes the test run to stop on the second failure, and so on.

## Chatter REST API

Chatter REST API includes new and changed resources, request bodies, and response bodies.

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. In this release you can attach multiple files to a feed post, use files resources without Chatter, and much more.



Note: To create custom Chatter and Communities experiences in Salesforce, use ConnectApi (Chatter in Apex).

### IN THIS SECTION:

New and Changed Chatter REST API Resources

New and Changed Chatter REST API Request Bodies

New and Changed Chatter REST API Response Bodies

## New and Changed Chatter REST API Resources

## **Announcements**

## Get announcements for the specified parent

To get announcements for a group, make a GET request to the new /chatter/announcements resource with the parentId parameter.

### Create an announcement

To create an announcement, make a POST request to the new /chatter/announcements resource with the updated Announcement Input.

## Update whether an announcement sends emails

To update whether an announcement sends emails to group members, make a PATCH request to the existing /chatter/announcements/announcementId resource with the updated Announcement Input.

## Async Queries (Pilot)

## Get results and status of async query jobs

To get the results and status of async query jobs, make a GET request to the /async-queries resource.

### Delete an async query job

To delete an async query job, make a DELETE request to /async-queries/jobId

## **Chatter Answers**

## Search articles and questions by language

To search for articles and questions by language, make a GET request to

/connect/communities/communityId/zones/zoneId/search-results?language=en USandinclude

the new language parameter. The value of the parameter must be a Salesforce supported locale code. In an <apex:page>, the default value is the language of the page. Otherwise, the default value is the user's locale.

## Communities Knowledge

### Get the trending articles for a community

To get the trending articles for a community, make a GET request to the new /connect/communities/*communityId*/trending-articles resource.

## Get the trending articles for a topic in a community

To get the trending articles for a topic in a community, make a GET request to the new /connect/communities/communityId/topics/topicId/trending-articles resource.

## **Datacloud**

## Add the listed Data.com contacts to your organization

To add contacts to a selected account, make a POST request to the new /connect/datacloud/*contact-imports* resource.

### **Environment Hub**

## Create an SSO user mapping between hub and member orgs

To create an SSO user mapping between a user in the Environment Hub and a user in a hub member org, make a POST request to the new /connect/environment-hub/sso-user-mappings resource.

## Generate an OAuth URL when connecting an org

To generate the URL that initiates the OAuth workflow when connecting an org, make a GET request to the new /connect/environment-hub/oauth-url-generator resource.

### Validate an edition or template ID when creating an org

To verify that the edition or template ID specified is valid, make a GET request to the new /connect/environment-hub/signup-member-validation resource.

## Validate a My Domain value when creating an org

To verify that a specified My Domain value is available, valid, and unique, make a GET request to the new /connect/environment-hub/my-domain-validation resource.

### Feeds

## Attach multiple files that have already been uploaded to Salesforce to a feed post

To attach up to five already uploaded files to a feed post, make a POST request to the existing /chatter/feed-elements resource with the new files property in the Feed Element Capabilities Input. Attaching multiple files to comments isn't supported.

Important: In version 36.0 and later, you can't create a feed post and upload a binary file in the same request.

### Access the files capability of a feed element

To access the files capability of a feed element, make a GET request to the new /chatter/feed-elements/**feedElementId**/capabilities/files resource.

### Access the social post capability of a feed element

To access the social post capability of a feed element, make a GET request to the new /chatter/feed-elements/**feedElementId**/capabilities/social-post resource.

## **Files**

## Files resources no longer require Chatter

Files resources no longer require Chatter, and their URIs have changed. This table describes how to migrate from earlier API versions to API version 36.0.

In API version 35.0 and earlier, use	In API version 36, use
/chatter/files/batch/ <i>fileIds</i>	/connect/files/batch/ <b>fileIds</b>
/chatter/files/ <b>fileId</b>	/connect/files/fileId
/chatter/files/ <b>fileId</b> /content	/connect/files/ <b>fileId</b> /content
/chatter/files/ <b>fileId</b> /file-shares	/connect/files/ <b>fileId</b> /file-shares
/chatter/files/ <b>fileId</b> /file-shares/link	/connect/files/ <b>fileId</b> /file-shares/link
/chatter/files/ <b>fileId</b> /previews	/connect/files/ <b>fileId</b> /previews
/chatter/files/fileId/previews/previewFormat	/connect/files/ <b>fileId</b> /previews/ <b>previewFormat</b>
/chatter/files/ <b>fileId</b> /rendition	/connect/files/ <b>fileId</b> /rendition
/chatter/folders/ <b>folderId</b>	/connect/folders/ <b>folderId</b>
/chatter/folders/ <b>folderId</b> /items	/connect/folders/ <b>folderId</b>
/chatter/users/ <i>userId</i> /files	/connect/files/users/ <i>userId</i>
/chatter/users/ <i>userId</i> /files/filter/groups	/connect/files/users/ <i>userId</i> /filter/groups
<pre>/chatter/users/userId/files/filter /shared-with-me</pre>	<pre>/connect/files/users/userId/filter /shared-with-me</pre>
<pre>/connect/communities/communityId/chatter /files/moderation</pre>	<pre>/connect/communities/communityId/files /moderation</pre>
<pre>/connect/communities/communityId/chatter /files/fileId/moderation-flags</pre>	<pre>/connect/communities/communityId/files /fileId/moderation-flags</pre>

## **Files Connect**

## Get information about a repository file's supported previews

To get information about a repository file's supported previews, make a GET request to the new /connect/content-hub/repositories/*repositoryId*/files/*repositoryFileId*/previews resource. File previews are supported only for Google Drive.

## Get a repository file preview

To get a repository file preview, make a GET request to the new

/ connect/content-hub/repositories/ repositoryId/files/ repositoryFileId/previews/ previewFormat resource.

Supported values for previewFormat are:

- pdf—Preview format is PDF.
- svg—Preview format is SVG.

- thumbnail—Preview format is 240 x 180 PNG.
- big-thumbnail—Preview format is 720 x 480 PNG.
- tiny-thumbnail—Preview format is 120 x 90 PNG.

File previews are supported only for Google Drive.

## Manage external file permissions for SharePoint Online and OneDrive for Business

Previously, managing external file permissions was limited to Google Drive. Now you can manage external file permissions for SharePoint Online and OneDrive for Business using these existing resources:

- /connect/content-hub/repositories/repositoryId/items/repositoryItemId/permissions
- /connect/content-hub/repositories/repositoryId/items/repositoryItemId/permissions/types

### Get file permission information for a repository file

To get file permission information for a repository file, make a GET request to the existing

 $/{\tt connect/content-hub/repositories}/ \textit{repositoryId}/{\tt files/repositoryFileId} \textit{resource} \ \textit{with the new includeExternalFilePerimissionsInfo} \ \textit{parameter}.$ 

Managing external file permissions is supported for Google Drive, SharePoint Online, and OneDrive for Business.

## Reuse a reference to an external file when posting a file

To reuse an existing reference to an external file when posting a file, make a POST request to the /connect/files/users/userId resource with the new reuseReference parameter or with the updated File Input.

### **Forecasts**

### Search the list of users whose forecasts the context user has access to view

To search the list of users whose forecasts the context user has access to, make a GET request to the /connect/forecasting/jump-to-user resource and pass a search string that includes part of the user's name. Requires Collaborative Forecasts.

### Get the manager at the top of the forecast hierarchy

To get the manager at the top of the forecast hierarchy, make a GET request to the /connect/forecasting/manager-ancestors resource. Requires Collaborative Forecasts.

### Get the managers between a specified user and the context user in the forecast hierarchy

To get the list of managers between a specified user and the context user in the forecast hierarchy, make a GET request to the /connect/forecasting/manager-ancestors/forecastingManagerUserRoleId resource. Requires Collaborative Forecasts.

## Determine whether the context user has access to view a specified user's forecast

To find out whether the context user has access to view a user's forecast, make a GET request to the /connect/forecasting/user-access resource. Requires Collaborative Forecasts.

## Groups

#### Create a broadcast group

In a broadcast group, only group owners and managers can create posts. To create a broadcast group, make a POST request to the existing /chatter/groups resource with the updated Group Input request body.

### Change a group to a broadcast group

To change a group to a broadcast group, make a PATCH request to the existing /chatter/groups/*groupId* resource with the updated Group Input request body or with the new isBroadcast parameter set to true.

## Get, create, or delete the banner photo for a group

To get, create, or delete the banner photo for a group, make a GET, POST, or DELETE request to the new /chatter/groups/groupId/banner-photo resource.

Group owners and managers and users with the "Manage All Data" permission can create and delete group banner photos.

### Recommendations

Community managers (users with the "Create and Set Up Communities" or "Manage Communities" permission) can access, create, and delete recommendation audiences, recommendation definitions, and scheduled recommendations in their communities. Users with the "Modify All Data" permission can also access, create, and delete recommendation audiences, recommendation definitions, and scheduled recommendations

### Get the recommendations associated with a recommendation channel

To get the recommendations associated with a channel, make a GET request to these existing resources with the new channel parameter.

- /chatter/users/userId/recommendations
- /chatter/users/userId/recommendations/action
- /chatter/users/userId/recommendations/action/objectCategory
- /chatter/users/userId/recommendations/action/idPrefix

### Create a scheduled recommendation in a channel

To create a scheduled recommendation in a channel, make a POST request to the existing

/connect/scheduled-recommendations resource with the new channel parameter or with the updated Scheduled Recommendation Input.

### **Get topic recommendations**

Topic recommendations are available only in communities.

To get topic recommendations, make a GET request to these existing resources.

- /chatter/users/userId/recommendations
- /chatter/users/userId/recommendations/follow
- /chatter/users/userId/recommendations/follow/topics
- /chatter/users/userId/recommendations/follow/0TO
- /chatter/users/userId/recommendations/follow/recommendedTopicId

## Delete a topic recommendation

To delete a topic recommendation, make a DELETE request to the existing

/chatter/users/userId/recommendations/action/objectId resource, where action is follow and objectId is recommendedTopicId.

## **Topics**

## Create a topic

To create a topic, make a POST request to the existing /connect/topics resource with the description and name parameters or with the Topic Input.

## Get topics a user is knowledgeable about for a list of users

To get the top five topics a user is knowledgeable about for a list of users, make a GET request to the new /chatter/users/batch/userIds/knowledgeable-about-topics resource.

## **User Profiles**

## Get, create, or delete the banner photo for a user

To get, create, or delete the banner photo for a user, make a GET, POST, or DELETE request to the new /chatter/user-profiles/userId/banner-photo resource.

## New and Changed Chatter REST API Request Bodies

### **Announcements**

## **Announcement Input**

This request body has these new properties:

- feedItemId—ID of an AdvancedTextPost feed item that is the body of the announcement.
- isArchived—Specifies whether the announcement is archived.
- parentId—ID of the parent entity for the announcement, that is, a group ID when the announcement appears in a group.
- sendEmails—Specifies whether the announcement is sent as an email to all group members regardless of their email setting for the group. If Chatter emails aren't enabled for the organization, announcement emails aren't sent. Default value is false.

### **Datacloud**

## **Datacloud Contact Import Input**

This new request body has these properties:

- datacloudContactIds—A comma-separated list of up to 200 contact IDs to import.
- parentAccountId—The ID of an account.



**Note**: To add contacts to a specific company, specify the parentAccountId. To add records as leads, don't specify a parentAccountId.

### **Environment Hub**

## **Environment Hub SSO User Mapping Input**

This new request body has these properties:

- hubUserId—The ID of a user in an Environment Hub organization.
- memberUsername—The username of a user in an Environment Hub member organization.

## **Feeds**

## **Feed Element Capabilities Input**

This request body has one new property, files, which is used to attach files that have already been uploaded and remove files from a feed element. The content property is no longer available for feed posts. Use the files property to attach already uploaded files to feed posts.



**Important:** In version 36.0 and later, you can't create a feed post and upload a binary file in the same request. Upload files to Salesforce first, and then use these new request bodies and properties to attach one or more files to the feed post.

## File ID Input

This new request body has these properties:

• id—ID of a file that has already been uploaded.

- operationType—Specifies the operation to carry out on the file.
  - Add—Adds the file to the feed element.
  - Remove—Removes the file from the feed element.

### **Files Capability Input**

This new request body has one property, items, which is a collection of file IDs and the operations to be carried out on those files.

## **Files Connect**

## **Files Input**

This request body has one new property, reuseReference, which specifies whether to reuse the latest version of a reference to an external file rather than creating a duplicate.

## Groups

## **Banner Photo Input**

This new request body has these properties:

- cropHeight—Height of the crop rectangle in pixels.
- cropWidth—Width of the crop rectangle in pixels.
- cropX—X position of the crop rectangle from the left edge of the image in pixels. Top left is position (0,0).
- cropY—Y position of the crop rectangle from the top edge of the image in pixels. Top left is position (0,0).
- fileId—ID of an existing file. The key prefix must be 069, and the file size must be less than 8 MB.
- versionNumber—Version number of an existing file. If not provided, the latest version is used.

### **Group Input**

This request body has one new property, isBroadcast, which specifies whether the group is a broadcast group. In broadcast groups, only group owners and managers can create posts.

### **Recommendations**

### **Custom List Audience Criteria Input**

This new request body has these properties:

- memberOperationType—The operation to carry out on the audience members.
- members—A collection of user IDs.
- type—Value must be CustomList.

## **New User Audience Criteria Input**

This new request body has these properties:

- value—The maximum number of days since a user became a community member.
- type—Value must be MaxDaysInCommunity.

### **Recommendation Audience Input**

This request body has one new property, criteria, which is the criteria for either the custom list or the new members recommendation audience type.

This request body no longer supports the memberOperationType and members properties. In version 36.0 and later, use the memberOperationType and members properties, respectively, in the Custom List Audience Input.

## **Scheduled Recommendation Input**

This request body has one new property, channel, which ties recommendations together. For example, display recommendations in specific places in the UI or show recommendations based on time of day or geographic locations.

## **User Profiles**

## **Banner Photo Input**

This new request body has these properties:

- cropHeight—Height of the crop rectangle in pixels.
- cropWidth—Width of the crop rectangle in pixels.
- cropX—X position of the crop rectangle from the left edge of the image in pixels. Top left is position (0,0).
- cropy—Y position of the crop rectangle from the top edge of the image in pixels. Top left is position (0,0).
- fileId—ID of an existing file. The key prefix must be 069, and the file size must be less than 8 MB.
- versionNumber—Version number of an existing file. If not provided, the latest version is used.

## New and Changed Chatter REST API Response Bodies

### **Announcements**

### **Announcement**

This response body has these new properties:

- isArchived—Specifies whether the announcement is archived.
- sendEmails—Specifies whether the announcement is sent as an email to all group members.

## Async Queries (Pilot)

## **Async Query**

The status property has a new possible value, Canceled, which means that the job has been canceled.

### **Async Query Collection**

This new response body has one property, asyncQueries, which is a collection of Async Query response bodies.

## Case Feed Emails

## **Email Address**

This response body has one new property, relatedRecord, which is the record summary of a related record, such as a user or contact.

## **Email Attachment**

This new response body has these properties:

- attachment—Record summary of the attachment.
- contentType—Type of attachment.
- fileName—Name of the attachment.

## **Email Message Capability**

This response body has these new properties:

attachments—The attachments in the email message.

- bccAddresses—The BCC addresses for the email message.
- body—The body of the email message.
- ccAddresses—The CC addresses for the email message.
- fromAddress—The From address for the email message.
- isRichText—Indicates whether the body of the email message is in rich text format.

This response body no longer supports the textbody property. In version 36.0 and later, use the body property.

### Communities

## Community

This response body has one new property, loginUrl, which is the login URL for the community.

### Datacloud

## **Datacloud Contact Import**

This new response body has these properties:

- duplicatesSkippedCount—The number of duplicate records blocked from being added.
- errorCount—The number of errors generated for this response.
- errorMessageDescriptionUrl—The URL to the error message for this response.
- importStatus—The status of this response.
- orgAllowsDuplicates—Indicates whether duplicate rules are turned on for the organization. True means that the organization accepts duplicate records, and false means the organization blocks duplicate records.
- successCount—The number of contacts successfully added to the organization.

### **Datacloud Contact Import Status**

This new response body has these properties:

- datacloudId—The contact's ID. Each contactId is a unique numeric value.
- importStatus—The import status for each contact listed in the request. Values are:
  - Duplicate
  - Error
  - Success

### **Environment Hub**

### **Environment Hub My Domain Validation**

This new response body has one property, validationError, which specifies why the proposed My Domain is invalid.

## **Environment Hub OAuth URL**

This new response body has one property, oauthUrl, which specifies the URL for initiating the OAuth workflow when connecting an org to the hub.

### **Environment Hub Sign-up Member Validation**

This new response body has these properties:

- errorMessage—If the parameters were invalid, this property contains the error string.
- orgEdition—If the parameters were valid, this property contains the edition of the member org.
- trialMaxLengthDays—If the parameters were valid, this property contains the trial length of the member org.

## **Environment Hub SSO User Mapping Validation**

This new response body has these properties:

- errorFieldNames—If the parameters were invalid, this property contains the names of fields with errors.
- errorMessage—If the parameters were invalid, this property contains the error string.
- hubUserId—The ID of a user in an Environment Hub organization.
- memberUsername—The username of a user in an Environment Hub member organization.
- userMappingId—The ID of the new SSO user mapping.

## **Feeds**

### Content

This new response body has these properties:

- checksum—MD5 checksum for the file.
- contentHubRepository—The external data source associated with this file, or null if it doesn't point to an external file
- contenturl—URL of the content for links.
- description—Description of the attachment.
- downloadUrl—URL to the content.
- externalDocumentUrl—The external URL this file points to, or null if it doesn't point to an external file.
- fileExtension—Extension of the file.
- fileSize—Size of the file in bytes. If size can't be determined, returns unknown.
- fileType—Type of file, such as PDF.
- hasPdfPreview—true if the file has a PDF preview available; false otherwise.
- id—18-character ID of the content.
- isInMyFileSync—true if the file is synced with Salesforce Files Sync.
- mimeType—MIME type of the file.
- renditionUrl—URL to the rendition resource for the file.
- renditionUrl240By180—URL to the 240 x 180 pixel rendition resource for the file.
- renditionUr1720By480—URL to the 720 x 480 pixel rendition resource for the file.
- repositoryFileId—The ID of the file in the external repository, or null if the file isn't external.
- repositoryFileUrl—The URL of the Chatter REST API resource giving access to the external repository file properties, or null if this file doesn't point to an external file.
- sharingOption—Sharing option of the file. Values are:
  - Allowed—Resharing of the file is allowed.
  - Restricted—Resharing of the file is restricted.
- textPreview—Text preview of the file if available; null otherwise.
- thumb120By90RenditionStatus—Specifies the rendering status of the 120 x 90 preview image of the file.
- thumb240By180RenditionStatus—Specifies the rendering status of the 240 x 180 preview image of the file.
- thumb720By480RenditionStatus—Specifies the rendering status of the 720 x 480 preview image of the file.
- title—Title of the file.
- versionId—Version ID of the file.

### **Features**

This response body has one new property, maxFilesPerFeedItem, which specifies the maximum number of files that can be added to a feed item.

## **Feed Element Capabilities**

This response body has these new properties:

- files—Indicates whether a feed element has file attachments.
- socialPost—Indicates whether a feed element can interact with a social post in a social network.

This response body no longer supports the content property. Use the files property.

## **Feed Entity Is Editable**

This response body has one new property, areAttachmentsEditableByMe, which indicates whether the context user can add and remove attachments on a feed element or comment.

## **Files Capability**

This new response body has one property, items, which is a collection of files.

### **Social Account**

This new response body has these properties:

- handle—Social handle, screen name, or alias that identifies this account.
- name—Name of the account as defined by the account's owner.
- profileUrl—URL to the account's profile.

## **Social Post Capability**

This new response body has these properties:

- author—The social account that authored the social post.
- content—The content body of the social post.
- i con—The icon of the social network
- id—The ID associated with the social post Salesforce record.
- isOutbound—If true, the social post originated from the Salesforce application.
- name—The title or heading of the social post.
- postUrl—The external URL to the social post on the social network.
- provider—The social network that this social post belongs to.
- recipient—The social account that is the recipient of the social post.
- status—The status of the social post.

## **Social Post Status**

This new response body has these properties:

- message—Status message.
- type—Status type.

### **Files Connect**

### **Content Capability**

This response body has one new property, repositoryFileId, which is the ID of the file in the external repository or null if the file isn't external

### File Detail

This response body has one new property, repositoryFileId, which is the ID of the file in the external repository or null if the file isn't external.

## **File Summary**

This response body has one new property, repositoryFileId, which is the ID of the file in the external repository or null if the file isn't external.

## **Repository File Detail**

This response body has these new properties:

- externalFilePermissionInformation—External file permission information, such as available groups, available permission types, and current sharing status.
- previewUrlThumbnail—URL to the thumbnail (240 x 180 PNG) preview.
- previewUrlThumbnailBig—URL to the big thumbnail (720 x 480 PNG) preview.
- previewUrlThumbnailTiny—URL to the tiny thumbnail (120 x 90 PNG) preview.
- previewsUrl—URL to the previews.

## **Repository File Summary**

This response body has these new properties:

- externalFilePermissionInformation—External file permission information, such as available groups, available permission types, and current sharing status.
- previewUrlThumbnail—URL to the thumbnail (240 x 180 PNG) preview.
- previewUrlThumbnailBig—URL to the big thumbnail (720 x 480 PNG) preview.
- previewUrlThumbnailTiny—URL to the tiny thumbnail (120 x 90 PNG) preview.
- previewsUrl—URL to the previews.

## **Forecasts**

## **Forecasting Manager**

This new response body has these properties:

- firstName—First name of the forecast manager at this role.
- hierarchyLevel—Level of this forecasting manager above the forecasting manager requested in the hierarchy tree.
- lastName—Last name of the forecast manager at this role.
- userId—User ID of the forecast manager user.
- userRoleId—ID for the user role object attached to this profile.

## **Forecasting Manager Ancestors**

This new response body has these properties:

- ancestors—List of parent forecasting managers.
- url—URL that generated the list of managers.
- userRoleId—ID for the user role object attached to this profile.

## **Forecasting User**

This new response body has these properties:

- firstName—First name of the forecasting user.
- lastName—Last name of the forecasting user.
- userId—ID of the forecasting user.

## **Forecasting User Access**

This new response body has these properties:

- canAccess—The value is true if the context user can access the forecast user, false if they can't.
- userId—The ID of the user being queried.

### **Forecasting User Access Collection**

This new response body has one property, users, which is a list of accessible forecasting users.

## **Forecasting User Collection**

This new response body has these properties:

- jumpToUsers—A collection of forecasting users that the context user can jump to.
- url—The URL that generated the collection of users.

## Groups

### **Banner Photo**

This new response body has these properties:

- bannerPhotoUrl—URL to the banner photo in a large format. This URL is available only to authenticated users.
- bannerPhotoVersionId—18-character version ID of the banner photo.
- url—URL to the banner photo.

### Group

This response body has these new properties:

- bannerPhoto—The banner photo for the group.
- isBroadcast—Specifies whether the group is a broadcast group (true) or not (false). In a broadcast group, only group owners and managers can post to the group.

## **Group Detail**

This response body has these new properties:

- bannerPhoto—The banner photo for the group.
- isBroadcast—Specifies whether the group is a broadcast group (true) or not (false). In a broadcast group, only group owners and managers can post to the group.

## Knowledge

### **Knowledge Article Version**

This new response body has these properties:

- articleType—Type of the knowledge article.
- id—ID of the knowledge article version.
- knowledgeArticleId—ID of the corresponding knowledge article.
- lastPublishedDate—Last published date of the knowledge article.
- summary—Summary of the knowledge article contents.
- title—Title of the knowledge article.
- urlName—URL name of the knowledge article.

## **Knowledge Article Version Collection**

This new response body has one property, items, which is a collection of knowledge article versions.

## Recommendations

### **Custom List Audience Criteria**

This new response body has these properties:

- memberCount—Total number of members in the recommendation audience.
- members—The members of the recommendation audience.
- type—Value must be CustomList.

### **New User Audience Criteria**

This new response body has these properties:

- maxDaysInCommunity—The maximum number of days since a user became a community member.
- type—Value must be MaxDaysInCommunity.

## **Recommendation Audience**

This response body has these new properties:

- criteria—The criteria for the recommendation audience type.
- modifiedBy—User who last modified the recommendation audience.
- modifiedDate—An ISO 8601 format date string, for example, 2011-02-25T18:24:31.000Z.

This response body no longer supports the memberCount and members properties. In version 36.0 and later, these properties are available in the Custom List Audience Criteria response body.

## **Scheduled Recommendation**

This response body has one new property, channel, which ties recommendations together. For example, display recommendations in specific places in the UI or show recommendations based on time of day or geographic locations.

## **Topics**

### **Batch Result Item**

The result property of this response body supports Topics People Are Knowledgeable About Collection for the new /chatter/users/batch/userIds/knowledgeable-about-topics resource.

## Topic

This response body has one new property, nonlocalizedName, which is the non-localized name of the topic.

## **Topics People Are Knowledgeable About Collection**

This response body has one new property, userId, which is the ID of the user who is knowledgeable about the topics.

### **User Profiles**

## **Banner Photo**

This new response body has these properties:

- bannerPhotoUrl—URL to the banner photo in a large format. This URL is available only to authenticated users.
- bannerPhotoVersionId—18-character version ID of the banner photo.
- url—URL to the banner photo.

#### **User Detail**

This response body has one new property, bannerPhoto, which is the user's banner photo.

## Wave

### **Features**

This response body has one new property, wave, which indicates whether Wave is enabled.

# Reports and Dashboards REST API

The Reports and Dashboards REST API now returns information about filters, buckets, and custom summary formulas.

### IN THIS SECTION:

Changed Reports and Dashboards REST API Request and Response Bodies

Reports and Dashboards REST API includes new properties in the reportMetadata response body of resources.

## Changed Reports and Dashboards REST API Request and Response Bodies

Reports and Dashboards REST API includes new properties in the reportMetadata response body of resources. reportMetadata contains the following new properties.

Property	Description
buckets	Describes a bucket field.
crossFilters	Cross filters applied to the report.
customSummaryFormula	Describes a custom summary formulas.
topRows	Describes a row limit filter applied to the report.

For more information about these properties, see the Reports and Dashboards REST API Developer's Guide.

## Data.com API

We've improved how to count records, added a field, and updated some field properties. The Data.com API provides access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

### Count(ContactId) with DatacloudContact

You can use Count (contactId) to determine how many records are available for certain field values in the DatacloudContact object. GROUP BY is supported for these fields only.

- companyName
- Department
- Level
- Title

There are some limitations when using GROUP BY with the DatacloudContact object.

- DatacloudContact doesn't support grouping multiple fields. Run separate queries for each field.
- DatacloudContact doesn't support the roll-up or cube operators for GROUP BY.

# **EDITIONS**

Available in: Salesforce Classic

Available in: **Developer** Edition, **Professional** Edition (add-on), **Enterprise** Edition, and **Unlimited** Edition.

## Query:

```
SELECT Level, Count(ContactId)
FROM DatacloudContact
WHERE State IN ('CA','NV','AZ','OR','WA') AND CompanyName LIKE 'Cisco Systems'
GROUP BY Level
```

## Response:

Returned records 1-5 of 10916 total records in 0.105 seconds:

	Level	Unknown_Field1
1	Staff	5011
2	Manager-Level	4802
3	Director-Level	692
4	VP-Level	244
5	C-Level	167

## **Datacloud Contact Fields with Updated Properties**

companyName—Filter, Group, Sort

Department—Filter, Group, Restricted Picklist

- Engineering
- Finance
- Human Resources
- IT
- Marketing
- Operations
- Other
- Sales
- Support

Level—Filter, Group, Nillable, Restricted Picklist

- C-Level
- VP
- Director
- Manager
- Staff
- Other

Title—Filter, Group, Nillable, Sort

Title of the contact such as CEO or Vice President.

## **Datacloud Contact New Field**

IsInCrm—Defaulted on create, Group

• Whether the record is in Saleseforce (true) or not (false).

## **Bulk API**

Bulk API includes JSON support.

## JSON Support for Bulk API

To make loading and querying large amounts of data easier, Bulk API now supports JSON for requests, responses, and payloads.

# Streaming API

Streaming API includes a new feature, Durable Generic Streaming, and a beta feature, Durable PushTopic Streaming, in version 36.0.

#### IN THIS SECTION:

### Replay Generic Streaming Events (Generally Available)

You no longer have to worry about missed generic streaming events when subscribers are disconnected. You can now retrieve and replay past events with Durable Generic Streaming! Salesforce stores events for 24 hours and allows you to retrieve stored and new events. Subscribers can choose which events to receive by using replay options.

## Replay PushTopic Streaming Events (Beta)

You can now replay PushTopic-based streaming events! Salesforce stores events for 24 hours and allows you to retrieve stored and new events. Subscribers can choose which events to receive by using replay options.

# Replay Generic Streaming Events (Generally Available)

You no longer have to worry about missed generic streaming events when subscribers are disconnected. You can now retrieve and replay past events with Durable Generic Streaming! Salesforce stores events for 24 hours and allows you to retrieve stored and new events. Subscribers can choose which events to receive by using replay options.

The subscriber can choose which events to receive, such as all events within the retention window or starting after a particular event. The default is to receive only the new events sent after subscribing. Streaming API uses an event framework that decouples event producers from event consumers. Therefore, a subscriber can retrieve events at any time and isn't restricted to listen to events at the time they're sent. Events outside the 24-hour retention period are discarded.

## **Event Numbering**

Each broadcasted event is assigned a numeric ID. IDs are incremented sequentially, but they're not guaranteed to be contiguous for consecutive events. For example, the event following the event with ID 999 can have an ID of 1,025. However, each ID is guaranteed to be higher than the ID of the previous event. The ID is unique for the org and the channel. The IDs of deleted events aren't reused.

The ID is added in the replayId field of the notification message. For example, this JSON message shows the replayId field in the event object.

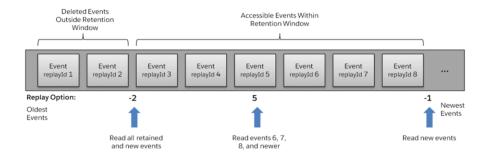
```
{
  "clientId":"alps4wpe52qytvcvbsko09tapc",
  "data":{
     "event":{
          "createdDate":"2015-11-13T19:05:28.334Z",
          "replayId":55
     },
```

```
"payload":"This is a message."
},
"channel":"/u/TestStreaming"
}
```

In API version 36.0, the time format of the createdDate field value has also changed to make it consistent with the time format used in the Salesforce app. The time portion now ends with the Z suffix instead of +0000. Both suffixes denote a UTC time zone.

## **Replaying Events**

The following diagram shows a high-level overview of a stream of events and how event consumers can read events by using various replay options.



**Table 4: Replay Options** 

Replay Option	Description
Replay ID	Subscriber receives all events after the event specified by its replayld value.
-1	Subscriber receives new events that are broadcast after the client subscribes.
-2	Subscriber receives all events, including past events that are within the 24-hour retention window and new events sent after subscription.

To replay events, use the following endpoint.

```
https://Salesforce_Instance/cometd/replay/36.0/
```

The replay mechanism is implemented in a Salesforce-provided CometD extension called cometdReplayExtension. Register this extension and then call the setReplay() function. The following example registers the extension in JavaScript.

```
// Register streaming extension
var replayExtension = new cometdReplayExtension();
replayExtension.setChannel(<Streaming Channel to Subscribe to>);
replayExtension.setReplay(<Event Replay Option>);
cometd.registerExtension('myReplayExtensionName', replayExtension);
```



## Note:

- The argument passed to setReplay () is one of the replay options listed in Replay Options.
- The first argument passed to registerExtension() is the name of the replay extension in your code. In the example, it is set to myExtensionName, but it can be any string. You use this name to unregister the extension later on.
- If the setReplay () function isn't called, or the CometD extension isn't registered, only new events are sent to the subscriber (same as the -1 option).

After calling the setReplay() function on the extension, the events that the subscriber receives depend on the replay value parameter passed to setReplay().

## Higher Event Limits for Durable Generic Streaming

With Durable Generic Streaming, you can send a higher number of events per day than with Generic Streaming if you're using Enterprise, Performance, or Unlimited Edition. The limit for the number of streaming channels remains unchanged. This table compares the event limits of both features.

Description	Performance and Unlimited Editions	Enterprise Edition	Professional Edition	Developer Edition
Maximum number of events within a 24–hour period with Durable Generic Streaming	1,000,000	200,000	100,000	10,000
Maximum number of events within a 24–hour period with Generic Streaming	100,000	100,000	100,000	10,000

### SEE ALSO:

GitHub: Durable Generic Streaming Demo GitHub: Streaming Replay Client Extensions

## Replay PushTopic Streaming Events (Beta)

You can now replay PushTopic-based streaming events! Salesforce stores events for 24 hours and allows you to retrieve stored and new events. Subscribers can choose which events to receive by using replay options.



**Note**: Durable PushTopic Streaming (Beta) is production quality but has known limitations. You can provide feedback, suggestions, and questions for this feature in the Durable Streaming API group in the Salesforce Success Community. For information on enabling this feature for your org, contact Salesforce.

The subscriber can choose which events to receive, such as all events within the retention window or starting after a particular event. The default is to receive only the new events sent after subscribing. Streaming API uses an event framework that decouples event producers from event consumers. Therefore, a subscriber can retrieve events at any time and isn't restricted to listen to events at the time they're sent. Events outside the 24-hour retention period are discarded.

The way PushTopic events are replayed is identical to how Generic Streaming events are replayed, except for the subscription channel. The channel for PushTopic events includes the name of the PushTopic. For example:

"channel": "/topic/MyTopicName"

You can subscribe to a PushTopic channel by passing replay options to a CometD extension at the following replay endpoint.

https://**Salesfoce\_Instance**/cometd/replay/36.0/

To learn how to pass options to the replay CometD extension, see the code examples in Replay Generic Streaming Events (Generally Available) and the Spring '16 version of the Streaming API Developer Guide.

### SEE ALSO:

GitHub: Durable PushTopic Streaming Demo GitHub: Streaming Replay Client Extensions

# **Tooling API**

Tooling API includes new objects and headers, behavior changes, and enhanced support for a REST resource.

The Force.com 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.

Tooling API Calls and Methods

Tooling API includes new or changed SOAP calls or REST methods.

## Tooling API New and Changed Objects

Tooling API includes new and changed objects.

## **New Objects**

## ApexTestSuite

Represents a suite of Apex classes to include in a test run. A TestSuiteMembership object associates each class with the suite.

## KeywordList

Represents a list of keywords used in community moderation.

### ModerationRule

Represents a rule used in your community to moderate user-generated content.

### **PathAssistant**

Represents a Sales Path.

### PathAssistantStepInfo

Represents guidance for a step on a Sales Path.

## PathAssistantStepItem

Represents layout or guidance details for a step on a Sales Path.

#### **TestSuiteMembership**

Represents a class in an ApexTestSuite.

## **Changed Objects**

### QuickActionDefinition

The following fields have been added:

### OptionsCreateFeedItem

Indicates whether successful completion of the action creates a feed item (true) or not (false). Applies only to Create Record, Update Record, and Log a Call quick action types.

### SuccessMessage

The message that displays to the user upon successful completion of the action.

#### SandboxInfo

The field ApexClassId represents a class you can specify to perform tasks after a sandbox copy. You specify the class when you create the sandbox.

## Tooling API Calls and Methods

Tooling API includes new or changed SOAP calls or REST methods.

## **SOAP Calls**

## describeValueType() (DescribeValueTypeResult)

The describeValueType() call now returns more information about the type being described. This call is also available in Metadata API, and the changes are documented in the Metadata API section of the release notes. For more details, see describeValueType().

### runTests() and runTestsAsynchronous()

You can now pass ApexTestSuite IDs to the runTestsAsynchronous() SOAP call.

You can pass a maxFailedTests parameter to the runTests() and runTestsAsynchronous() SOAP calls.

The structure of a call to runTests () hasn't changed, but the RunTestsRequest object that it takes now has a maxFailedTests field. To allow all tests in a run to execute, set maxFailedTests to -1 or don't specify a value. To stop the test run from executing new tests after a given number of tests fail, set maxFailedTests to an integer value from 0 to 1,000,000. This integer value sets the maximum allowable test failures. A value of 0 causes the test run to stop if any failure occurs. A value of 1 causes the test run to stop on the second failure, and so on.

### **REST Resource**

### runTestsAsynchronous

You can now POST a suiteids list to the runTestsAsynchronous REST resource. You can POST both a suiteids list and a classids list to runTestsAsynchronous. However, if you send a tests array, you can't send suiteids or classids.

You can also POST an optional maxFailedTests parameter. To allow all tests in your org to run, regardless of how many tests fail, omit maxFailedTests or set it to -1. To stop the test run from executing new tests after a given number of tests fail, set maxFailedTests to an integer value from 0 to 1,000,000. This integer value sets the maximum allowable test failures. A value of 0 causes the test run to stop if any failure occurs. A value of 1 causes the test run to stop on the second failure, and so on. Keep in mind that high values can cause slow performance. Each 1,000 tests that you add to your maxFailedTests value add about 3 seconds to your test run, not including the time that the tests take to execute.

## Metadata API

Metadata API includes updated calls, and new and changed types.

### IN THIS SECTION:

### Metadata API Calls

A metadata API call was modified in version 36.0.

## Metadata API Types

Metadata API includes new and changed types and fields.

## Metadata API Calls

A metadata API call was modified in version 36.0.

## **Updated Metadata Calls**

The following Metadata API call has changed.

## describeValueType() (DescribeValueTypeResult)

The describeValueType() call now returns more information about the type being described. The additional information is returned in DescribeValueTypeResult and indicates whether the type can be created, deleted, read, or modified through the API. Also, information about the parent of the type field or folder is returned. Likewise, the call has been enhanced for foreign keys—the foreign key domain was sometimes not returned and is now returned. DescribeValueTypeResult has the following new fields.

### apiCreatable

Indicates whether this value type can be created through the createMetadata() call (true) or not (false).

## apiDeletable

Indicates whether this value type can be created through the deleteMetadata() call (true) or not (false).

## apiReadable

Indicates whether this value type can be created through the readMetadata() call (true) or not (false).

#### apiUpdatable

Indicates whether this value type can be created through the updateMetadata() call (true) or not (false).

### parentField

Information about the parent of this value type. Parent field information is useful for metadata types that are specified with the parent in their name, such as custom fields, email templates, workflow rules, and reports. For example, the full name of a custom field includes the sObject that contains it (for example, Account.field1\_\_c). Similarly, the full name of an email template includes the folder where the template is stored (for example, MyFolder/EmailTemplate1).

## Metadata API Types

Metadata API includes new and changed types and fields.

## New Metadata Types

## Certificate

Represents a certificate used for digital signatures which verify that requests are coming from your org. Certificates are used for either authenticated single sign-on with an external website, or when using your org as an identity provider.

## DelegateGroup

Represents a group of users who have the same administrative privileges. These groups are different from public groups used for sharing.

## KeywordList

Represents a list of keywords used in community moderation. This keyword list is a type of moderation criteria that defines offensive language or inappropriate content that you don't want in your community.

#### ModerationRule

Represents a rule used in your community to moderate user-generated content. Each rule specifies the user-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. You can create rules that block, flag, or replace user-generated content that contains offensive language or inappropriate content.

## Updated Metadata Types and Fields

These metadata types have changed or have fields that have been added or changed.

#### **ActionOverride**

The following field has been added:

#### formFactor

If the type field is set to flexipage, set this field to Large to override the View action with a Lightning Page in Lightning

This field is part of the pilot feature for creating and editing record pages in Lightning Experience.



Note: Creating and editing Lightning Experience record pages using the Lightning App Builder is currently available to Developer Edition organizations through a pilot program. Pilot programs are subject to change, and as such, we cannot guarantee a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available.

The type field now accepts the new enumeration value flexipage.

## ActivitiesSettings

The following field has been updated.

## allowUsersToRelateMultipleContactsToTasksAndEvents

This read only field indicates whether Shared Activities is enabled. When the value is true, allows users to relate multiple contacts to a task or event.



(1) Important: Beginning with API v36.0, this field is read-only in all versions of the API. You can't change the value of this field. Even though this field was updateable before Spring '16, changing this field's value wasn't supported and could have resulted in an incorrect integration. If you have code in older API versions that changes the value of this field, ensure you update that code to prevent any errors.

#### AuraDefinitionBundle

The type field now accepts the new enumeration value Tokens.

### **AuthProvider**

The following fields have been added.

### customMetadataTypeRecord

Required, but only with custom authentication provider plug-ins, when ProviderType is Custom. The API name of the authentication provider.

#### plugin

An existing Apex class that implements the Auth. AuthProviderPlugin interface.

The providerType field now accepts the new enumeration value Custom.

### CustomApplication

The following fields have been added.

### enableTabHover

Indicates if a Salesforce console app has tab hover enabled, which displays summary information about a record in an overlay when the user hovers over a tab.

### enableTabLimits

Indicates whether limits are enabled on the number of primary tabs and subtabs that can be opened in a Salesforce console session. When true, values for tabLimitConfig are required

### tabLimitConfig

Represents the maximum number of primary tabs and subtabs allowed in one Salesforce console session. Required if enableTabLimits is true.

#### CustomMetadata

Added support for the upsertMetadata() function.

#### ExternalDataSource

The following field has been updated.

### customConfiguration

For an external data source of type OData or OData4, this JSON-encoded configuration string has the following new parameters, listed with their corresponding fields in the user interface.

- csrfTokenEnabled—CSRF Protection
- csrfTokenName—Anti-CSRF Token Name

### Network

The following fields have been added:

### allowedExtensions

Specifies the types of files allowed in your community. This whitelist of file types lets you control what your community members upload and also prevents spammers from polluting your community with inappropriate files.

#### maxFileSizeKb

Specifies the maximum file size (in KBs) that members can upload in your community.

## PlatformActionList

The actionListContext field now accepts the new enumeration values:

BannerPhoto. Banner photos are available on profiles in Lightning Experience.

ListViewDefinition. Returns the corresponding list view that can be created from the API.

Lookup. Returns the create action expected for creating an object or record from a lookup.

## PlatformCachePartition

The following fields have been added to the PlatformCachePartitionType subtype.

## allocatedPurchasedCapacity

The amount of namespace-specific purchased storage capacity, in MB, that is allocated for the cache type.

### allocatedTrialCapacity

The amount of trial cache space, in MB, that is allocated for the cache type.

The following field in the PlatformCachePartitionType subtype has been changed.

### allotedCapacity

This field is renamed to allocatedCapacity.

The following field has been removed from the PlatformCachePartitionType subtype.

### minimumCapacity

#### OuickAction

The following fields have been added.

### optionsCreateFeedItem

Indicates whether successful completion of the action creates a feed item (true) or not (false). Applies only to Create Record, Update Record, and Log a Call quick action types.

### successMessage

The message that displays to the user upon successful completion of the action.

SEE ALSO:

Deployment

## **Data Services**

Bulk API has been enhanced to handle higher data volumes and Async SOQL supports more commands.

### IN THIS SECTION:

Bulk API for BigObjects

You can use Bulk API to import large volumes of external data (1 GB or more) into Salesforce BigObjects.

Enhancements to Async SOQL (Pilot)

Async SOQL supports a wider range of SOQL queries, and makes it easier to track and cancel jobs.

## **Bulk API for BigObjects**

You can use Bulk API to import large volumes of external data (1 GB or more) into Salesforce BigObjects.



**Note**: This feature is available to select customers through a pilot program. To be nominated to join this pilot program, contact salesforce.com. Additional terms and conditions may apply to participate in the pilot program.

Until now, there was no convenient way to import large amounts of data into Salesforce. The two main options for importing data into standard or custom objects, SOAP API and Bulk API, both have limitations at high data volumes. To overcome these limitations, Bulk API has been enhanced to import data into BigObjects, which are designed to store billions of records.

## How Is Bulk API for BigObjects Different?

The following restrictions apply when using Bulk API for BigObjects.

- 1. A maximum of three batches can run concurrently.
- 2. All data must be in CSV file format. XML and binary attachments aren't supported.
- 3. The only supported operation is insert. You can't update, upsert, or delete data.
- **4.** The only concurrency mode supported is parallel.
- 5. The following headers are not supported in the SOAP request.
  - Batch Retry
  - Line Ending
  - PK Chunking

- 6. You can only import data into the field types supported for BigObjects, that is, Text, Number, DateTime, and Lookup.
- 7. The status information is only updated after the job is completed.
- **8.** You can't retrieve the entire data set uploaded, via the Request object. Only a summary of results is provided, listing the total number of records that succeeded or failed.

# Enhancements to Async SOQL (Pilot)

Async SOQL supports a wider range of SOQL queries, and makes it easier to track and cancel jobs.



**Note**: This feature is available to select customers through a pilot program. To be nominated to join this pilot program, contact salesforce.com. Additional terms and conditions may apply to participate in the pilot program.

## Additional SOQL Commands

You can now use these SOQL commands in any Async SOQL query.

#### **Date Formats**

For example:

YYYY-MM-DD, YYYY-MM-DDThh:mm:ss-hh:mm

### **HAVING**

You can use this to filter results from aggregate functions. For example:

SELECT COUNT(Id) count, CreatedById createdBy FROM FieldHistoryArchive GROUP BY CreatedById HAVING COUNT(CreatedById) > 2

## Job Management

## **Tracking All Jobs**

You can get status information for all jobs currently running, via the following HTTP GET request.

https://instance name-api.salesforce.com/services/data/v35.0/async-queries/

## Canceling a Job

You can cancel a job by specifying its jobID, via an HTTP DELETE request.

https://instance\_name-api.salesforce.com/services/data/v35.0/async-queries/jobID

# Salesforce Console API (Integration Toolkit)

The toolkit includes new and updated methods that let you customize a console programmatically. This feature is available in Salesforce Classic only.

For more information (English only) about the toolkit, see the *Salesforce Console Integration Toolkit Developer's Guide*.

The following methods are new or have changed in API version 36.0.

### disableTabClose

Prevents a user from closing a tab or a subtab. If the id parameter doesn't specify a tab, the enclosing tab is used. You can also use this method to re-enable a tab that has been disabled.

### **Methods for Console Events**

A new payload element, tabObjectId, has been added to the sforce.console.ConsoleEvent.CLOSE\_TAB event. This payload specifies the object ID of the closed tab, if available.



**Note:** tabObjectId is generally the same as objectID. However, for tabs that close upon submission, no tabObjectId is generated. In those cases, the value of this field is either empty or null. For an Email, the value is empty. For a Case Comment, the value is null.

tabObjectId is available in API versions 30.0 and later.

## **EDITIONS**

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

# **ISVforce**

ISVforce tools make it easy to build, package, and distribute your apps and Lightning components. Spring '16 includes support for the Environment Hub in Lightning Experience and enhancements to the License Management App and API.

## IN THIS SECTION:

## Turn AppExchange Checkout Data into Insights and Actions

The Checkout Management App (CMA) brings the power of Salesforce to AppExchange Checkout. A beautiful dashboard visually displays AppExchange Checkout data, so it's easy to see how your offerings are performing. Automated email notifications keep customers and team members in the loop whenever activity occurs on your offerings. This feature is available in both Lightning Experience and Salesforce Classic.

## Allocate More Seats in the License Management App

We've increased the number of licensed seats that you can allocate per subscriber from 99,999 to 99,000,000. The new limit gives you more flexibility when licensing an offering to subscribers who use Salesforce products with many users, like Communities. This feature is available in both Lightning Experience and Salesforce Classic.

### Meet the New Environment Hub

We've brought Lightning Experience to the Environment Hub, so you can now create and manage orgs in an intuitive, efficient user interface. We've also changed the permissions required to create orgs for development, testing, and trials.

### API Enhancements for ISV Partners

We've enhanced the EnvironmentHubMember, Organization, and SignupRequest objects to give you better visibility into hub members and sign-up requests. We've also added resources to the Chatter REST API to give you increased programmatic control when creating or connecting orgs to the Environment Hub.

## Turn AppExchange Checkout Data into Insights and Actions

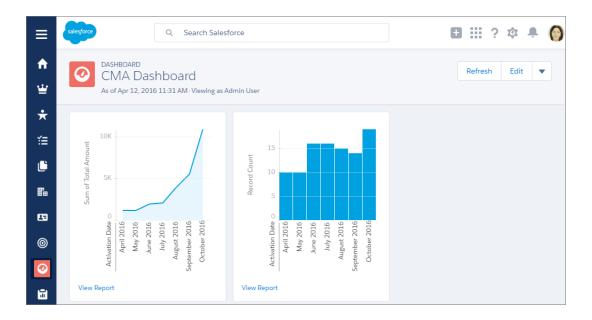
The Checkout Management App (CMA) brings the power of Salesforce to AppExchange Checkout. A beautiful dashboard visually displays AppExchange Checkout data, so it's easy to see how your offerings are performing. Automated email notifications keep customers and team members in the loop whenever activity occurs on your offerings. This feature is available in both Lightning Experience and Salesforce Classic.



**Note**: The Checkout Management App is available in English only to Salesforce eligible partners. For more information on the Partner Program, including eligibility requirements, visit https://partners.salesforce.com.

Previously, to get subscription and billing data for AppExchange offerings, you had to leave your Salesforce org. And making that data useful? Well, that was on you. Not anymore. The Checkout Management App combines your favorite Salesforce features—think dashboards, reporting, and automation—with AppExchange Checkout data, like subscriptions, invoices, and transactions.

The dashboard gives you a big picture view of your data.

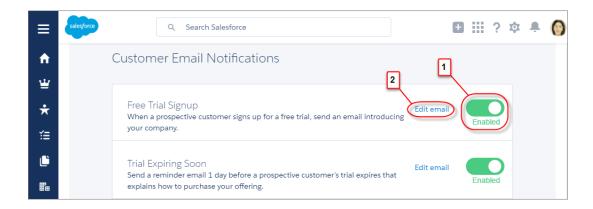


The dashboard is preconfigured to show:

- Revenue by month, so financial performance is always front and center
- New subscribers by month, so it's easy to see where growth is occurring
- Subscription plan by unit, so you know which configurations are popular with customers
- Subscription status by month, so you can stay on top of trials, purchases, and renewals

You can also customize the dashboard using standard Salesforce tools. For a detailed look at your data, view individual subscription plan, subscription, invoice, and transaction records.

To save time communicating with stakeholders, the CMA can send email notifications for situations that you often encounter as a partner, like renewal notices. Enable email notifications as needed (1) and then customize them to reflect your company's identity (2). Not in the mood to customize anything? No worries—we have you covered in each template with friendly and informative default content.



The Checkout Management App only works for offerings sold using AppExchange Checkout. You must also have the License Management App (LMA) installed in your org. For more information about the Checkout Management App, see the ISVforce Guide.

## Allocate More Seats in the License Management App

We've increased the number of licensed seats that you can allocate per subscriber from 99,999 to 99,000,000. The new limit gives you more flexibility when licensing an offering to subscribers who use Salesforce products with many users, like Communities. This feature is available in both Lightning Experience and Salesforce Classic.

You can change the number of licensed seats for a subscriber by modifying the license record.

- 1. Go to a license record in the License Management App (LMA).
- 2. Select **Modify License**. If you don't see Modify License, edit the page layout to add the control.
- **3.** In Seats, enter the number of licensed seats that you want for the subscriber, up to 99,000,000. For more information about the LMA, see the ISVforce Guide.

## EDITIONS

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

### Meet the New Environment Hub

We've brought Lightning Experience to the Environment Hub, so you can now create and manage orgs in an intuitive, efficient user interface. We've also changed the permissions required to create orgs for development, testing, and trials.

# EDITIONS

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

### IN THIS SECTION:

#### Create and Manage Orgs in Lightning Experience

The Environment Hub is now available in Lightning Experience. Create and manage your development, testing, and trial orgs in an intuitive, efficient user interface. This feature is available in both Lightning Experience and Salesforce Classic.

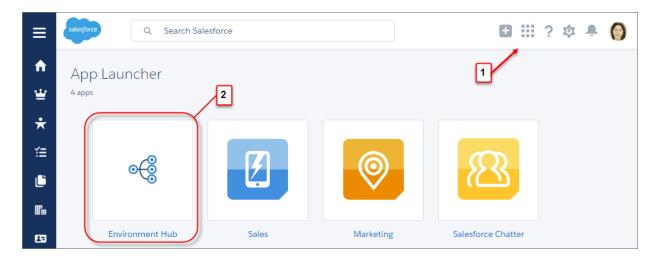
#### New Permissions Required to Create Orgs

To create development, test, and trial orgs from the Environment Hub, you must now enable "Create" and "Read" on the Signup Request object for non-admin hub users. If you want these users to remove orgs from the hub, enable "Delete" on the Signup Request object.

## Create and Manage Orgs in Lightning Experience

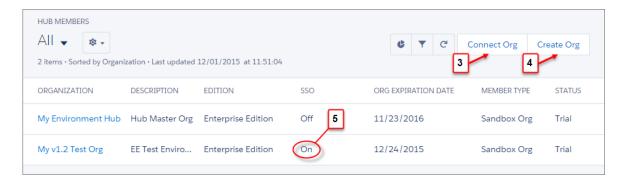
The Environment Hub is now available in Lightning Experience. Create and manage your development, testing, and trial orgs in an intuitive, efficient user interface. This feature is available in both Lightning Experience and Salesforce Classic.

To open the Environment Hub in Lightning Experience, first select the **App Launcher** (1) and then select **Environment Hub** (2).

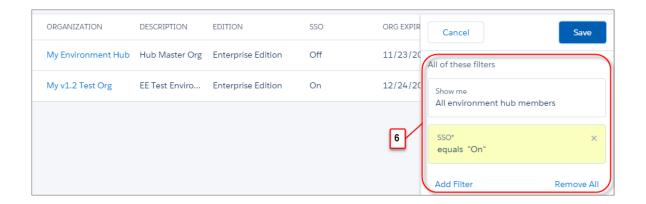


The Environment Hub in Lightning Experience supports the org creation and management tasks that you're accustomed to performing in Salesforce Classic, including:

- Connecting existing development, test, and trial environments to the hub (3)
- Creating standard and partner edition orgs for development, testing, and trials (4)
- Creating SSO user mappings for easier login access to hub member orgs (5)



And because filtering is easy in Lightning Experience, you can quickly customize your hub to show the orgs that matter to you. For example, you can create a filter to display only those orgs with SSO enabled (6).



To enable SSO user mapping or connect existing orgs to the Environment Hub in Lightning Experience, set up and deploy My Domain first. For information about the Environment Hub, see the ISVforce Guide.

## New Permissions Required to Create Orgs

To create development, test, and trial orgs from the Environment Hub, you must now enable "Create" and "Read" on the Signup Request object for non-admin hub users. If you want these users to remove orgs from the hub, enable "Delete" on the Signup Request object.

### API Enhancements for ISV Partners

We've enhanced the EnvironmentHubMember, Organization, and SignupRequest objects to give you better visibility into hub members and sign-up requests. We've also added resources to the Chatter REST API to give you increased programmatic control when creating or connecting orgs to the Environment Hub.



#### IN THIS SECTION:

### Chatter REST API Enhancements

You can now use the Chatter REST API to create an SSO user mapping in the Environment Hub or to generate an OAuth URL to connect an org to the hub. You can also validate edition, template ID, and My Domain values when creating an org.

#### Other API Enhancements

The EnvironmentHubMember object includes new fields that let you determine the number of SSO-mapped users in a hub member org, and if the hub member is a sandbox. The Organization object has a new field containing its ISO country code. The SignupRequest object has a new field where you can describe the org you're signing up. We've also added a limit to the number of orgs you can create per day from the Environment Hub.

## Chatter REST API Enhancements

You can now use the Chatter REST API to create an SSO user mapping in the Environment Hub or to generate an OAuth URL to connect an org to the hub. You can also validate edition, template ID, and My Domain values when creating an org.

#### Create an SSO user mapping between hub and member orgs

To create an SSO user mapping between a user in the Environment Hub and a user in a hub member org, make a POST request to the new /connect/environment-hub/sso-user-mappings resource.

#### Generate an OAuth URL when connecting an org

To generate the URL that initiates the OAuth workflow when connecting an org, make a GET request to the new /connect/environment-hub/oauth-url-generator resource.

### Validate an edition or template ID when creating an org

To verify that the edition or template ID specified is valid, make a GET request to the new /connect/environment-hub/signup-member-validation resource.

#### Validate a My Domain value when creating an org

To verify that a specified My Domain value is available, valid, and unique, make a GET request to the new /connect/environment-hub/my-domain-validation resource.

For information on these enhancements, including request and response bodies, see the Chatter REST API Developer Guide.

### Other API Enhancements

The EnvironmentHubMember object includes new fields that let you determine the number of SSO-mapped users in a hub member org, and if the hub member is a sandbox. The Organization object has a new field containing its ISO country code. The SignupRequest object has a new field where you can describe the org you're signing up. We've also added a limit to the number of orgs you can create per day from the Environment Hub.

#### EnvironmentHubMember

The following new fields have been added:

- IsSandbox—Indicates if the member org is a sandbox (true) or not (false).
- ServiceProviderId—Represents the ID of the service provider for a member org.
- SSOMappedUsers—Represents the total number of mapped users in a member org.

The following limits apply:

• Daily Limit—You can create up to 20 orgs per day. If you need to create additional orgs, log a case in the Partner Community.

#### Organization

A new field, SignupCountryIsoCode, has been added. This field represents the two-character ISO country code specified by the user in a sign-up request.

#### SignupRequest

The Edition field has three new picklist values: Group, Professional, and Enterprise.

A new field, SignupSource, has been added. This field stores a user-specified description of a trial sign-up, up to 60 characters in length.

For information on these enhancements, see the SOAP API Developer Guide.

# Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer-leveraging data from any source, and plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time, and measure the impact of each interaction on your business so you can optimize your approach in real time and deliver better results.

For more information, see the Marketing Cloud Release Notes.

#### SEE ALSO:

Marketing Cloud Overview

Marketing Cloud June Release Notes

Marketing Cloud July Release Notes

Marketing Cloud September Release Notes

Marketing Cloud October Release Notes

Salesforce Marketing Cloud Facebook Page

# Salesforce Overall: Lightning Experience Changes and More

Improve your overall Salesforce experience with the ability to change owners for more records in Lightning Experience. Plus, all new orgs now come with duplicate record management features turned on.

#### IN THIS SECTION:

#### **Supported Browsers**

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

### Duplicate Management Turned On for New Orgs

Maintaining high-quality data is one of the most important things you can do to help your organization get the most out of Salesforce. So we're excited to announce that all new Salesforce orgs now come with duplicate record management features turned on for accounts, contacts, and leads. Now it's easier than ever to prevent duplicate records in your org. This feature is available in both Lightning Experience and Salesforce Classic.

#### Edition Name in Lightning Experience

Your Salesforce organization edition can now be found on the company information page in Lightning Experience. In Salesforce Classic the edition is still shown in the browser tab and the Company Profile page.

### Change Owners for More Types of Records in Lightning Experience

Your users can now change record owners for work orders and campaigns, and assign some records, like leads, cases, work orders, and custom objects, to queues in Lightning Experience.

#### Edit Inline in Lightning Experience

Reps can now edit individual fields on a record details tab and easily edit multiple fields at one time. What's more: Users are warned if they try to navigate away before saving a record. No more lost edits!

#### Email Templates and Letterheads No Longer Support Scripts

To protect email recipients from potentially dangerous HTML content, Salesforce now applies a filter to prevent any active scripts from being included in letterheads and email templates. This feature is available in Salesforce Classic only.

## **Supported Browsers**

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

#### IN THIS SECTION:

#### Supported Browsers for Lightning Experience

Lightning Experience is supported with Microsoft® Internet Explorer® version 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–10, you're redirected to Salesforce Classic. There are some limitations.

#### Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® versions 5.x, 6.x and 7.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. There are some limitations.

## Supported Browsers for Lightning Experience

Lightning Experience is supported with Microsoft® Internet Explorer® version 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–10, you're redirected to Salesforce Classic. There are some limitations.



**Note:** You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce1, see "Requirements for the Salesforce1 Mobile App" in the Salesforce Help.

## **EDITIONS**

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

### Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Lightning Experience. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

### **Microsoft Internet Explorer version 11**



- Users of existing orgs can continue to use IE11 to access Lightning Experience until December 16, 2017.
- Users of new orgs created after Summer '16 can't use IE11 to access Lightning Experience. Instead, IE11 users are automatically redirected to Salesforce Classic.

For more details about this change, see Retirement of Support for Accessing Lightning Experience and Salesforce Using Internet Explorer 11.

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce 1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Compatibility View feature in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the X-UA-Compatibility header, isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.

Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

For configuration recommendations, see "Configuring Internet Explorer" in the Salesforce Help.

#### Mozilla® Firefox®, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see "Configuring Firefox" in the Salesforce Help.

## Google Chrome<sup>™</sup>, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.



**Note**: The latest stable version of Google Chromium<sup>™</sup> is supported.

### Apple Safari version 8.x on Mac OS X

There are no configuration recommendations for Safari.

Safari isn't supported for:

- Salesforce CRM Call Center built with CTI Toolkit versions earlier than 4.0
- Salesforce Wave Analytics

## **Wave Analytics Supported Browsers**

Browser support is available for Microsoft Internet Explorer version 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

## Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Google Chrome, make sure that the system setting Show scroll bars is set to Always.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

## Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® versions 5.x, 6.x and 7.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of 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 Salesforce1 app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce1, check out "Requirements for the Salesforce1 Mobile App" in the Salesforce Help.

#### Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Salesforce Classic. Note these restrictions.



Salesforce Classic available in: **All** Editions

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

### Microsoft Internet Explorer versions 9, 10, and 11

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 9, 10, and 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- Both Compatibility Mode and the Compatibility View in Internet Explorer aren't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the X-UA-Compatibility header, isn't supported.
- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

Note: Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

- Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.
- Internet Explorer 9 isn't supported for Salesforce Wave Analytics.
- Internet Explorer 9 and 10 aren't supported for the Lightning App Builder.

For configuration recommendations, see "Configuring Internet Explorer" in the Salesforce Help.



Mozilla Firefox, most recent stable version

Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service.

For configuration recommendations, see "Configuring Firefox" in the Salesforce Help.

Salesforce makes every effort to test and support the most recent version of Firefox.

#### Google Chrome, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

Chrome isn't supported for:

• The Console tab (The Salesforce console is supported.)

### Apple Safari versions 5.x, 6.x and 7.x on Mac OS X

There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.

Safari isn't supported for:

- The Salesforce console
- Salesforce CRM Call Center built with CTI Toolkit versions below 4.0
- Salesforce Wave Analytics

## **Wave Analytics Supported Browsers**

Browser support is available for Microsoft Internet Explorer versions 10 and 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

## Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting Show scroll bars is set to Always.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

Some features in Salesforce—and some desktop clients, toolkits, and adapters—have their own browser requirements. For example:

- Internet Explorer is the only supported browser for:
  - Standard mail merge
  - Installing Salesforce Classic Mobile on a Windows Mobile device
  - Connect Offline
- For the best experience with the enhanced page layout editor, use Firefox.
- For the best experience on machines with 8 GB of RAM in the Salesforce console, use Chrome.
- Browser requirements also apply for uploading multiple files on Chatter.

# **Duplicate Management Turned On for New Orgs**

Maintaining high-quality data is one of the most important things you can do to help your organization get the most out of Salesforce. So we're excited to announce that all new Salesforce orgs now come with duplicate record management features turned on for accounts, contacts, and leads. Now it's easier than ever to prevent duplicate records in your org. This feature is available in both Lightning Experience and Salesforce Classic.



**Important**: Duplicate Management uses Data.com technology. However, a Data.com license is *not* required to use this feature.

EDITIONS

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

New orgs come with standard account, contact, and lead duplicate rules, which define what happens when you try to save a duplicate record. Each standard duplicate rule has a corresponding matching rule that determines how two records are identified as duplicates.

No setup is required for new orgs, but you can always turn off these rules at any time or create custom rules.

If you try to add a duplicate record, the standard duplicate rules are set to show an alert. As part of Duplicate Management, you can easily create a custom report type to review duplicate records that were added.

For more information about Data.com Duplicate Management, including detailed information about duplicate and matching rules, see Managing Duplicate Records in Salesforce. You can also check out this video: Managing Duplicate Records in Salesforce with Duplicate Rules.

# Edition Name in Lightning Experience

Your Salesforce organization edition can now be found on the company information page in Lightning Experience. In Salesforce Classic the edition is still shown in the browser tab and the Company Profile page.

EDITIONS

Available in all editions

You can check your edition on the Company Information page.

- 1. From Setup, enter Company Information in the Quick Find box, then select Company Information.
- **2. Organization Edition** appears in the lower right.

# Change Owners for More Types of Records in Lightning Experience

Your users can now change record owners for work orders and campaigns, and assign some records, like leads, cases, work orders, and custom objects, to queues in Lightning Experience.



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

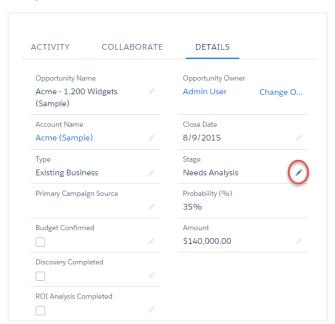
# Edit Inline in Lightning Experience

Reps can now edit individual fields on a record details tab and easily edit multiple fields at one time. What's more: Users are warned if they try to navigate away before saving a record. No more lost edits!

Inline editing is fast and easy. When you double-click a field or click the edit icon of next to it, the entire record opens in edit mode. Reps can breeze through the record and update several fields at once. It's more tedious in Salesforce Classic—you have to double-click each field to open it for editing.

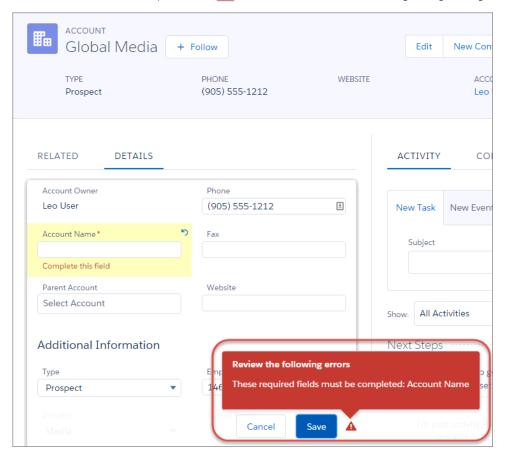
## EDITIONS

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



Here are a few more advantages to inline editing in Lightning Experience.

- Reps can navigate within the page while editing a record. They can switch to the record's chatter feed and back without losing changes.
- Reps are warned if they try to navigate to another page or browser tab without saving changes. No more redoing edits when they close the browser tab or browser by mistake.
- Error messages are more compact and easily accessible. Instead of appearing at the top of the form, error messages appear in a window at the bottom. Reps can click **A** to hide the window when scrolling through a long record.



- Note: Inline editing is automatically enabled in Lightning Experience by default. This permission can cause any Visualforce objects, formula fields, and Summary roll-up fields you've created to appear on the Create, Edit, or Clone Pages. If you see these fields on these pages but haven't configured them to work on these pages, contact Salesforce for help disabling the "SFX Inline Edit" permission. You can then edit your record by clicking the Edit button.
- Note: Right now, inline editing works only when editing record details. Soon, it'll be available in the Highlights panel and list views.

# Email Templates and Letterheads No Longer Support Scripts

To protect email recipients from potentially dangerous HTML content, Salesforce now applies a filter to prevent any active scripts from being included in letterheads and email templates. This feature is available in Salesforce Classic only.

# **Critical Updates**

This release includes updates that improve the performance, logic, and usability of Salesforce but might affect your existing customizations.

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 organization and modify affected customizations. After the opt-in period has passed, the update is automatically activated. For more details, see "Critical Updates" in the Salesforce Help.

#### "Serve Static Resources from the Visualforce Domain" Critical Update Postponed

In Summer '15, we changed the domain from which static resources are served. This change was released as a critical update named "Serve Static Resources from the Visualforce Domain" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

#### "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed

In Summer '15, we changed the behavior of the <code>getContent()</code> and <code>getContentAsPDF()</code> methods of the <code>PageReference</code> object. This change was released as a critical update named "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" and was scheduled for auto-activation in Spring '16. The auto-activation date has been postponed until Summer '16.

### **Encryption Key Management Permission Removed From Admin Profile**

Admins must now actively assign the ability to perform key management roles. The "Manage Encryption Keys" permission will be revoked for the standard admin profile when you activate this Critical Update.

Custom profiles that include the Manage Encryption Keys permission are not affected. Any user who has the permission via a custom profile or permission set will still have the permission.

#### SEE ALSO:

"Serve Static Resources from the Visualforce Domain" Critical Update Postponed

"PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed Key Management Permission Not Granted by Default

# Help and Training

We offer more engaging content and improved limits documentation. We added walkthroughs and Trailhead modules and added and updated instructional videos. We also updated some of our trust and compliance documents.

#### IN THIS SECTION:

#### More engaging content where you need it most

This release offers more and better in-app user assistance, including improved messaging. We give you just the information you need, where you need it, to make you more efficient. In fact, you have more within Salesforce and less in the help site, so you won't venture away from your task at hand.

### Improved Salesforce Limits Documentation

We're updating the Salesforce Limits documentation so it's easier to understand and follow.

#### Walkthroughs

A walkthrough is a series of interactive steps that guides you through a task or feature. We created some walkthroughs to introduce you to different features in Salesforce, and more are on their way!

#### **Videos**

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

#### Trailhead Modules

Looking for a good way to get started with Salesforce or dive into 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.

#### Trust and Compliance Documentation

The Salesforce Trust and Compliance Documents have undergone seasonal updates.

#### Updates to the Security Implementation Guide

We've expanded the security implementation documentation to include Transaction Security.

# More engaging content where you need it most

This release offers more and better in-app user assistance, including improved messaging. We give you just the information you need, where you need it, to make you more efficient. In fact, you have more within Salesforce and less in the help site, so you won't venture away from your task at hand.

### Lightning Experience Help and Training menu

Each page in Lightning Experience features a Help menu with links to resources—help topics, walkthroughs, videos, developer guides, and PDFs—related to the specific tasks on that page. On object pages, the menu replaces the Help for this Page link that you're used to using in Salesforce Classic.

For Setup pages, the original Help & Training link still appears, but we encourage you to use the new Help menu instead for a broader selection of useful information. If you've created custom help links, those links still work from the Help for this Page links in the Salesforce Classic pages. However, your custom help links don't appear in the new Help menu.

#### Let Salesforce walk you through it

Earlier this year we started delivering new interactive walkthroughs that help you understand key concepts and complete important tasks. If you're using Lightning Experience, look in our new help menus for links to these walkthroughs.

### **Videos**

This release provides even more engaging videos that help you quickly visualize tasks and concepts. If you're using Lightning Experience, clicking a video link opens a player, where you can watch the video without leaving Salesforce.

#### Search specific to your user interface

Expect to see different search results depending on the user interface you're using: Salesforce Classic or Lightning Experience. For example, if you're using Lightning Experience and searching the Help and Training site (help.salesforce.com), you'll notice that Lightning-specific help appears at the top of your search results.

#### **Trailhead**

Trailhead modules take less than 20 minutes and include knowledge checks. If you're using a Developer Edition, you can collect badges to track your progress

# Improved Salesforce Limits Documentation

We're updating the Salesforce Limits documentation so it's easier to understand and follow.

At Salesforce, we continually work on existing documentation to improve its usefulness. In this release, we adjusted the Salesforce Limits documentation, and we will continue to do so over the next few releases. We based our changes on the following goals.

- Reduce documentation volume and redundancy.
- Distinguish limits from limitations.

#### Limits

Measurement information based on a key aspect of a feature. Limits regulate the use of a feature, and are usually numeric.

### Limitations

Information about features users might expect. Limitations are often things a user needs to consider before doing something.

- Add cross-references in the Salesforce Limits documentation to Salesforce Help topics about related features, including procedural topics and topics that address limitations and considerations.
- Improve the visual presentation of limits for easier comprehension.

# Walkthroughs

A walkthrough is a series of interactive steps that guides you through a task or feature. We created some walkthroughs to introduce you to different features in Salesforce, and more are on their way!

Before you start a walkthrough, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce. Bon voyage!



**Important:** Keep in mind that walkthroughs guide you through your own Salesforce account, so you're actually making changes to the data in your organization as you walk through the steps. If you're concerned about making these changes, follow the walkthrough in a sandbox account or other test environment first.

Feature	Walkthroughs	You'll need
Report on File Search Activity	■ Walk Through It: Report on File Search Activity	"Run Reports" AND "View All Data" OR "Content Administrator". Users with "Manage Library" for the library don't need the "View All Data" or "Content Administrator" permissions to run the report.

## **Videos**

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new Getting Started with Work.com video introduces you to Work.com's performance management features. Use Work.com to recognize your coworkers, align your company using goals, create coaching relationships tied to definable metrics, give and request feedback, and roll out performance summaries.
- The new Live Agent Configuration video shows you how to set up and test Live Agent in your Salesforce Console. Get your agents chatting!
- The new Learn More About the Security Health Check video introduces the Security Health Check, a tool for Salesforce admins. Learn how to evaluate and remediate security risks for your entire Salesforce org.
- The new Introduction to Salesforce Authenticator video introduces Salesforce Authenticator, a mobile app for two-factor authentication. Learn how easy it can be to keep your Salesforce account secure.
- The new Get Ready to Migrate to Lightning Experience video demonstrates how the Migration Assistant is here to guide you during the transition to our new user experience.
- The new Getting Started with Salesforce for Outlook video is here to replace one of our classics, the "Getting Ready to Integrate Microsoft" Outlook" and Salesforce" video. But have no fear! The latest version still shows your sales reps how to download and install Salesforce for Outlook on their own. And with an updated look and bonus footage, to boot!

## **Trailhead Modules**

Looking for a good way to get started with Salesforce or dive into 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://developer.salesforce.com/trailhead and find the right trail for you.

# Trust and Compliance Documentation

The Salesforce Trust and Compliance Documents have undergone seasonal updates.

## Notices and Licenses

The following changes have been made in the **Notices and Licenses Documentation**:

#### Salesforce

Clarified use of term Customer Data in Customer Data section.

Updated open source table.

Added Exchange Sync section.

### **Analytics Cloud**

Clarified use of term Customer Data in Customer Data section.

Updated open source table.

#### ExactTarget

Updated Third Party Notices section to reflect current product offering.

Clarified use of term Customer Data in Customer Data section.

#### Marketing Cloud

Clarified use of term Customer Data in Customer Data section.

#### **Predictive Intelligence**

Clarified use of term Customer Data in Customer Data section.

#### Desk.com

Updated 'Third Party Applications' section to reflect current set of third-party application integrations.

Clarified use of term Customer Data in Customer Data section.

#### Heroku

Clarified use of term Customer Data in Customer Data section.

### Data.com

Clarified use of term Customer Data in Customer Data section.

#### SalesforceIQ

Updated 'Third Party Notices' section to reflect current product offering.

Clarified use of term Customer Data in Customer Data section.

#### **Pardot**

No changes.

#### Work.com

Clarified use of term Customer Data in Customer Data section.

## Security, Privacy, and Architecture

The following changes have been made in the **Security, Privacy, and Architecture Documentation**:

#### Salesforce

Salesforce Infrastructure: Updated information about geographic location of primary and secondary data centers for EU instances and Sandboxes CS82 and CS83.

Audits and Certifications: Added information on the Salesforce's Binding Corporate Rules and their scope.

Audits and Certifications: Added information on the scope of Salesforce's scope of PCI Attestation of Compliance.

#### **Analytics Cloud**

Audits and Certifications: Updated information to reflect that the Analytics Cloud Services' information security management system is within the scope of an ISO 27001 certification.

Audits and Certifications: Updated information to reflect that the information security control environment applicable to the Analytics Cloud Services now undergoes an independent evaluation in the form of a SOC 2 report.

#### ExactTarget

Security Controls: Added language clarifying that the ExactTarget Services use a machine-specific fingerprint for two-factor authentication; added reference to single sign-on as an additional feature.

Security Procedures, Policies and Logging: Clarified that Watchdog Behavior Analysis Program involves logging of anomalous behavior on the ExactTarget Services.

#### **Predictive Intelligence**

Security Controls: Added references to features involving single sign-on and identity validation.

Security Logs: Added section discussing use of logs to enable security reviews and analysis.

Physical Security: Added reference to Amazon Web Services website for additional information on physical security for data hosted on AWS.

Return of Customer Data: Updated to clarify that some raw data is deleted on a rolling basis, and that the Customer Data retrievable after termination generally consists of reports generated by the Predictive Intelligence Services.

Deletion of Customer Data: Updated to state that Customer Data will be deleted after termination upon request, and that Salesforce reserves the right to delete such data if not retrieved by the customer within 30 days of termination.

Tracking and Analytics: Clarified that data identifiable to customer or any individual will not be contained in anonymized data sets described in this section.

#### Radian6

Third-Party Architecture: Added section to disclose use of content delivery networks.

Security Logs: Added section discussing use of logs to enable security reviews and analysis.

#### **Buddy Media**

Third-Party Architecture: Updated section to disclose use of content delivery networks.

Security Logs: Added section discussing use of logs to enable security reviews and analysis.

Physical Security: Added reference to Amazon Web Services website for additional information on physical security for data hosted on AWS

Tracking and Analytics: Clarified that data identifiable to customer or any individual will not be contained in anonymized data sets described in this section.

#### Social.com

Security Logs: Added section discussing use of logs to enable security reviews and analysis.

Tracking and Analytics: Clarified that data identifiable to customer or any individual will not be contained in anonymized data sets described in this section.

#### Data.com

Audits and Certifications: Updated information to reflect that the information security control environment applicable to the Data.com Services now undergoes an independent evaluation in the form of a SOC 3 report.

Audits and Certifications: Added that Salesforce's most recent SOC 1 and SOC 2 reports are available upon request.

#### Desk.com

Physical Security: Added reference to Amazon Web Services website for additional information on physical security for data hosted on AWS.

#### Heroku

Third-Party Architecture: Added "with the exception of Heroku private spaces offerings" to clarify that Heroku products marketed as "private spaces" (when generally available) may be hosted outside of the United States or Ireland.

Physical Security: Added reference to Amazon Web Services website for additional information on physical security for data hosted on AWS.

#### SalesforceIQ

Physical Security: Added reference to Amazon Web Services website for additional information on physical security for data hosted on AWS.

# Updates to the Security Implementation Guide

We've expanded the security implementation documentation to include Transaction Security.

The Security Implementation Guide now includes the Transaction Security feature. The new section combines information from both the Salesforce online help and the Apex Developer Guide. Now there's a single place where you can review setting up Transaction Security, creating custom Transaction Security policies, and modifying policies with Apex.

# Other Salesforce Products

## desk.com

Desk.com is an all-in-one customer support app for small businesses and growing teams.

For information on new features, go to the Desk.com Product Updates Blog.

## Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the Heroku Changelog.