Winter ’19 Release In a Box
A Digital Resource for Admins, User Group Leaders/Members, Developers and more!
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Introduction: Release Enablement Kit

A Ready-to-Go Presentation & Demo Kit

What’s Included in this Kit?

1. **A Winter ‘19 Release PDF Presentation**
   Includes top 58 features of the Release with descriptions, Release Notes and screenshot of the feature, and demo video per page. Pick and choose the ones you want to highlight.

2. **Product Demos**
   Includes a playlist featuring 2-3 minute digestible demos for each feature.

We want to help you get familiarized with the top new features available with the Winter ’19 release and help teach others how to use them.

We’ve designed this kit to help you learn more about Winter ‘19 through a combination of slides, Release Notes, and short demo videos.
Getting Started

Follow these 3 steps to prepare yourself to talk about the Winter ‘19 Release

1. Pick the feature slides you want to review (slides 12-76). **We recommend highlighting 5 features per session.**

2. Watch the associated demo videos. For the full playlist: [Click here](#)

3. Share your Feedback! [Click here](#)
So many features! Which ones to pick?
Use the legend below to help you choose the right features for your audience.

ASTRO’S QUICK TIP:
We recommend picking 5 features per 30 minute learning session.
Introducing, Winter ‘19!

Highlighting some top features.
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# Winter ’19 Release Highlights

## Sales
1. Salesforce email integration
2. CPQ: Evergreen Subscriptions
3. Pardot in Lightning Experience
4. Territory Forecasting
5. Custom Fields in Einstein Forecasting and Opportunity Scoring
6. Trailhead Badging in Salesforce Essentials

## Service
1. LiveMessage in Lightning Experience
2. Customer Community: Help Center Template
3. Social Customer Service for YouTube
4. Field Service Lightning: Dispatcher Console for Contractors
5. Guided Action History
6. Trailhead Badging in Salesforce Essentials

## Community
1. Threaded Discussions
2. Lightning Flow for Guest Users
3. Recognition Badges
4. Partner Co-branding
5. Audience Targeting

## Commerce
1. Storefront Reference Architecture
2. Einstein Deployment Dashboard
3. Optimized Price Books
4. Promoted Search Refinements
5. Language Analyzer for Site Search

## Industries
### Financial Services Cloud
1. Action Plans
2. Salesforce Surveys for Financial Services Cloud
3. Einstein Bots for Financial Services Cloud
4. Commercial Banking App

### Health Cloud
1. Utilization Management
2. Health Insurance Data Model

## Platform
1. Heroku Compliance and Trust Enhancements
2. Einstein Prediction Builder
3. Passwordless Logins
4. Shield: Platform Encryption Enhancements
5. Background Utilities

## Lightning
1. List Enhancements
2. Visualforce Custom Code for Lightning Console Apps
3. Reports and Dashboards: Quick Search Enhancements
4. Display Density
5. Background Utilities

## Einstein Analytics
1. Einstein Discovery in Analytics UI
2. Sharing Inheritance Enhancements
3. File-Based Connector for Amazon S3
4. Lightning Reports: Drill Down
5. Mobile: Push Notifications

## Marketing
1. Journey Builder: Journey Testing
2. Social Studio: Real-Time Reports
3. Distributed Marketing: Multi-Business Unit Support
4. Social Studio: Inbound/Outbound Filters for Instagram

## Success Cloud
1. Salesforce Help Enhancements
2. 59 New & Refreshed Accelerators

## Platform Services
1. Heroku Compliance and Trust Enhancements
2. Einstein Prediction Builder
3. Passwordless Logins
4. Shield: Platform Encryption Enhancements
5. Background Utilities

## Quip
1. Live Apps in the Salesforce AppExchange
2. Project Tracker Live App
3. Process Bar Live App
4. Image Live App
5. In-line Edit History
Heroku Compliance and Trust Enhancements

Enterprise security and control for building scalable apps.

Extend the Heroku experience developers love to the enterprise with new innovations in trust and compliance.

*Included with purchase of add-on Heroku
Einstein Prediction Builder
Instantly unleash the power of Machine Learning on your data.

Make predictions about almost any field in Salesforce with just a few clicks.

Use these predictions to power a workflow, focus your efforts, and work smarter.
Passwordless Login
Seamless logins with unparalleled security.

Declaratively deliver passwordless login experiences to external users.

Learn More  Watch Demo
Shield Platform Encryption Enhancements
Strengthen your data's security while preserving functionality.

More ways to add an extra layer of security to your data.

Encrypt data stores in Custom Object Name, Rich Text Area, fields references in matching rules and Change Data Capture events.

Change your encryption scheme through the Metadata API.

Learn More  Watch Demo
Einstein Analytics
Einstein Discovery in Analytics UI
Discovery running on Salesforce platform.

Full spectrum of Analytics is in one place with shared datasets, enhanced story navigation and regional servers.

*Included with purchase of Einstein Discovery
Sharing Inheritance Enhancements
Take control of sharing into your own hands.

Enhanced sharing security based on core sharing rules.
File-Based Connector for Amazon S3
Bring in more third-party data into Analytics.

Connect directly into Amazon S3 buckets on AWS to load CSVs into Analytics.
Lightning Reports: Drill Down
Understand WHY data is the way it is.

Drill Down allows a user to expand from summary to provide more detail of what makes up the numbers.

*Included with purchase of add-on Einstein Discovery
Mobile: Push Notifications
Stay informed no matter where you are.

Stay informed of the most critical changes and milestones in your business.

Create and manage your notifications right from the mobile app.

Learn More  Watch Demo
Lightning
List Enhancements

Drive collaboration with new ways to manage, find, and share your list views.

Find and share your Salesforce records using a list view.

Find records faster with searchable list views.

Create and modify list views to be shared with specific groups.

Learn More  Watch Demo
Visualforce Custom Code for Lightning Console Apps

Bring the code you love from Visualforce to Lightning Console Apps.

Customers using Visualforce for standard buttons like New and Edit in classic can continue to use that custom code in Lightning Console apps.
Reports and Dashboards: Quick Search
Manage your reports and dashboards better.

Quick Search will let you search within the report/dashboard list views.

Find your reports, dashboard and folders in-context.

[Learn More] [Watch Demo]
Display Density
Personalize the way view your data at a glance.

Personalize the Lightning UI with view options.

Choose a denser, more compact view of your data for faster, more informed decision making.
Background Utilities

Execute agent workflows and evoke alerts in the background.

Use Background Utilities for integrations, monitoring how your users work, add workspace tab limits, throw alerts, and more.
Salesforce email integration
Extend the world’s #1 CRM to email and calendar.

Work with Salesforce, including Einstein AI, directly in Outlook.

*Included with purchase of add-on Salesforce Inbox
CPQ: Evergreen Subscriptions
Build recurring relationships with your customers.

Quote, sell and manage subscriptions with no defined term or end date.

*Included with purchase of add-on CPQ
Pardot in Lightning Experience
A single platform experience for Marketing and Sales teams.

One Login, All Access
Simplify user management in Salesforce

Lightning Navigation
Personalize your marketing workspace

Salesforce Campaigns
360° view into all marketing activities

B2B Marketing Analytics
Maximize marketing impact with insights

* Included with purchase of add-on Pardot
Territory Forecasting

Measure sales performance with territory-based quotas and forecasts.

More flexibility over how you view and adjust the forecast.

*Included with purchase of add-on Sales Cloud Einstein
Custom Fields in Einstein Forecasting and Opportunity Scoring

The world’s #1 CRM is now the world’s most intelligent CRM with Einstein AI.

Use custom fields in addition to standard fields to drive Einstein’s predictions.

Include unique business data to improve prediction accuracy.

*Included with purchase of add-on Sales Cloud Einstein
Trailhead Badging in Salesforce Essentials

Start fast on Salesforce Essentials with built-in Trailhead learning.

Learn faster and better than ever before with Trailhead integration.

Set up your org and earn badges that will display in your Trailhead account.

*Included with purchase of Salesforce Essentials
Service Cloud
LiveMessage in Lightning Experience

Provide agents with a unified experience across digital channels

Easily setup LiveMessage directly from within Lightning Flow setup

Personalize triggered outbound messages

Increase agent productivity thanks to a unified experience across Digital Engagement channels

Learn More  Watch Demo
Customer Community: Help Center Template

Help your customers help themselves with an out-of-the-box Help Center.

Set up a Help Center faster than ever with a new out-of-the-box template

Extend the power of Service Cloud Knowledge to customers

24/7 access to support articles and FAQs increases case deflection and customer satisfaction

Learn More  Watch Demo

*Included with purchase of Service Cloud Essentials, Service Cloud EE & UE, and Community Cloud.
Field Service Lightning: Dispatcher Console for Contractors

Extend the scheduling power of Field Service Lightning to third parties

All the benefits of the dispatcher console, now extended to the contractor

Reshuffle, schedule and optimize work across your third party organization

No need for an org to purchase an additional dispatcher license for your contracting companies

*Included with purchase of add-on Contractor+

Learn More  Watch Demo
Guided Action History
Visibility for agents and supervisors to increase customer service consistency

Empower agents and supervisors with a complete view of the actions taken on a record with Guided Action History

Ensure that every customer service interaction is fully resolved with Mandatory Flows

Easily choose which flows are displayed with point and click visibility settings

Learn More  Watch Demo
Social Customer Service for YouTube
Empower agents with full context from YouTube for every customer, at a glance.

Answer comments from YouTube just like any other support case

YouTube video embedded inside the case page for further context

Hide, reply and manage YouTube comments from the Service Console

Learn More  Watch Demo

*Included with purchase of add-on Social Customer Service Pro or Full Edition w/ Social Studio
Trailhead Badging in Salesforce Essentials

Start fast on Salesforce Essentials with built-in Trailhead learning.

Learn faster and better than ever before with Trailhead integration.

Set up your org and earn badges that will display in your Trailhead account.

*Included with purchase of Salesforce Essentials
Marketing Cloud
Social Studio: Real-Time Reports
Receive real-time & scheduled alerts for posts relevant to you

Eliminates the need to be tethered to social studio

Increases efficiency for executive users that needs to be alerted to specific conversations, or anyone in PR/Crisis Communications

Post reports are shareable with other social studio users and by email address

Learn More  Watch Demo
Social Studio: Inbound/Outbound Filters for Instagram

Manage your Instagram account with speed and efficiency

Instagram Business Account features are continually evolving

Now social studio users can access new Instagram filtering directly from Social Studio

Filter your page by inbound or outbound posts

Learn More
Distributed Marketing: Multi-Business Unit Support
Empower nonmarketers with approved content and journeys from Marketing Cloud

Better support customers with multiple lines of business (eg. brands) while maintaining data and visibility control between marketing and nonmarketers

Share content and journeys from any Marketing Cloud business unit with a single Salesforce org

*Included in with Distributed Marketing purchase.*
Journey Builder: Journey Testing
Make rapid iterations and test journeys with confidence and ease

Give users a better understanding of what path a specific contact takes on a journey

Provides a robust and transparent testing experience

Allows users to test and modify a journey before the journey is activated

Watch Demo
Threaded Discussions
Make it easy for your customers to follow conversations and engage.

Customers can reply directly to a message or comment.

Conversations are easier to follow and manage.
Lightning Flow for Guest Users
Kick off a business process without logging in.

Add flows to unauthenticated sites.

Now visitors can file unauthenticated cases, declare GDPR settings, and troubleshoot, all without needing to login.
Recognition Badges
Award customers with badges for their accomplishments.

Customers can award each other for accomplishments within the community.

Admins can award customers with custom badges for accomplishments within the community.
Partner Co-Branding

Empower partners with co-branded marketing assets, personalized with CRM.

Provide your partners with co-branded marketing assets that are personalized and pre-populated.

Partners can access robust campaigns that are pre-branded with the partner’s branding.

Learn More  Watch Demo
Audience Targeting Enhancements
Build an even more personalized experience for your customers.

Target customers even more by building targeted lists with the "and/or" function.

You can even define criteria with: contains, does not contain, does not equal to and more.
Customer Community: Help Center Template

Help your customers help themselves with an out-of-the-box Help Center.

Customize Help Center templates using drag-and-drop components.

Give customers 24/7 access to support articles and FAQs.

Learn More  Watch Demo
Quip
Document Version History
Simple version tracking in every Quip document.

See changes and the author of the changes made to a document in Quip.

Revert back to an older version using Document Version History.

Watch Demo
Lucidchart Diagrams Live App
Add dynamic diagrams to your Quip docs.

Reps can see Lucidchart Diagrams influence maps within Quip documents, to know which individuals to target.

Update these documents and diagrams in real time and help increase productivity.
Gender-Neutral User Profiles

Your work speaks for itself.

Users are no longer asked to select a gender at signup.

Notifications and activity log copy have been rewritten to avoid personal pronouns entirely.
Editable Chat Messages
Edit your messages and comments anywhere within Quip.

Users can edit messages they’ve sent anywhere in the product.

Eg: 1:1 chats, comments, chat threads, etc...

Watch Demo
Commerce Cloud
Storefront Reference Architecture

Build state-of-the-art shopping experiences with a mobile optimized UX and modern site architecture.

Enable merchants to build state-of-the-art shopping experiences and get live quickly.

Watch Demo
Einstein Deployment Dashboard
Deploy the Einstein Artificial Intelligence engine with ease.

Easily deploy the Einstein Artificial Intelligence engine using this dashboard.

Get insights into the health of your deployment and clear guidance on any issues.

*Included with Commerce Cloud Einstein.
Optimized Price Books

Improve the speed of XML-based pricebook imports by >60%.

Gain speed and efficiency by importing XML-based pricebooks into Commerce Cloud.

Changes take effect immediately in the storefront saving time for business users.

*Contact Commerce Cloud Support to turn on this feature.
Promotion Search Refinements
Refine search results based on active promotions.

Create refinements based on available promotions.

Shoppers can refine the search or category pages by applicable promotions for an individual customer or customer group.
Multi-Site Sharing Capabilities
Share sorting rules across multiple sites quickly and easily.

Merchants can create sorting rules once, and share them across multiple sites.
Financial Services Cloud
Action Plans
Manage customer engagements with automated and compliant task orchestration.

Drive consistency across client engagements using templates of repeatable tasks.

Support compliance by ensuring timely completion of required tasks.

Enhance collaboration among task owners with automatic assignment of owners and deadlines.

Learn More  Watch Demo
Salesforce Surveys for Financial Services Cloud

Improve customer feedback with targeted survey questions.

Enhance insights with feedback and data from your customers.

Leverage survey data to create reports and dashboards and share information across your company.

Improve satisfaction scores for customers' experience with your firm.
Einstein Bots for Financial Services Cloud
Help retail banking customers help themselves.

Drive customer satisfaction with faster case resolution.

Achieve efficiencies with reduced web and contact center inquiries.

Enhance convenience for customers with a streamlined process for managing their card usage.

*Included with purchase Einstein.
Commercial Banking App
Create transparency across commercial banking and other lines of business.

Improve transparency with a holistic customer view across the bank.

Increase collaboration by connecting relationship managers and lending assistants in commercial banking.

Reduce operational costs and achieve efficiencies with a modern onboarding experience for commercial clients.

Learn More  Watch Demo
Health Cloud
Utilization Management
Deliver more personalized and appropriate care.

Streamline care requests through guided, collaborative, and measurable workflows directly within Health Cloud.

Achieve optimal patient outcomes and contain medical costs with new payer capabilities for Health Cloud.

Learn More  Watch Demo
Health Insurance Data Model
Unify the benefits, claims, and authorization process.

Access benefits, claims, and authorization information all in one place, driving more productivity for service agents and clinical professionals.

Simplify the integration of systems of record into a single health console to better understand each member's needs.

Learn More  Watch Demo
Success Cloud
Salesforce Help Enhancements
Get personalized, detailed answers on your schedule.

New Appointment Scheduler lets you choose the best times for an Accelerator or other Support contacts.

Better recommendations, more personalized views, and detailed information about your success plan.
New & Refreshed Accelerators

Take advantage of our latest 1-on-1 working sessions designed to meet your needs.

Added or updated 70 Accelerators based on customer feedback.
Premier Success Plans for B2B Commerce, CPQ Billing and myTrailhead

Get the expert guidance and support of Premier for some of our newest products!

Premier Success plans now offered for newest products.

Plans include 24/7 Support, Accelerators, certified admin help, and more!

Watch Demo
Thank you!

Learn more at salesforce.com/winter19