Winter ’20 Release Preview

A digital resource for Admins, Business Users, Community Groups, Developers, and more.
Connect to your Customers in Whole New Ways

For sales professionals, Winter ‘20 provides greater productivity benefits with Sales Cadence Branching and Account Teams & Opportunity Contact Role Enhancements. And, with enhancements to Einstein Forecasting, predict sales outcomes in the way that makes sense for your business on a quarterly basis enabling your teams to work smarter and faster in Sales Cloud.

For service professionals, Winter ‘20 brings you more productivity and customization features than ever before. Connect with your customer where they are and resolve cases faster with features like Einstein Case Routing and Lightning Knowledge Enhancements. And, with more Field Service Lightning capabilities, ensure your field reps have all the information they need from anywhere at anytime.

For marketers, Winter ‘20 helps customers get smarter about targeting the right customers at the optimal times. With new Journey Builder features like Einstein Send Time Optimization and In-App Messaging for Mobile increase engagement across your email subscribers and mobile audience.

For IT professionals, expanded Lightning features in Winter ‘20 help Admins and Developers quickly and easily build and collaborate throughout the Salesforce Platform. With new Lightning productivity features combined with intelligence features from Einstein Analytics, rest assured you’re using the smartest and most productive platform in the market. Finally, trust remains our #1 value as we have prioritized new General Data Protection Regulation compliances across the entire Salesforce platform.

All this and more is going live September 6, 2019. Preview all at www.salesforce.com/winter20
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Introduction: Release Enablement Kit
A Ready-to-Use Presentation & Demo Kit

What’s Included in this Kit?

1. A Winter ‘20 Release PDF Presentation
   An overview of the top 89 features that includes descriptions, screenshot views, demo videos, and Release Notes. Select the ones you want to discover for a personalized experience.

2. Product Demos
   Includes a playlist featuring 2-3 minute digestible demos for most features.

We want to help you get familiarized with the most exciting new features available in the Winter ’20 release and empower you to teach others how to use them.

We’ve designed this kit to help you learn more about the newest innovations coming in Winter ‘20 through a combination of slides that you can mix and match to create a personalized learning journey.
Getting Started

Follow these 3 steps to prepare yourself to talk about the Winter ‘20 Release

1. Pick the feature slides you want to review (slides 11-120). We recommend highlighting 5 features per session.

2. Watch the associated demo videos. For the full playlist: Click here

3. Visit the Winter ‘20 Release Website for additional resources: 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.
## Winter ’20 Release Highlights

### Sales
1. Account Teams & Opportunity Contact Roles
2. High Velocity Sales: Sales Cadence Branching
3. Sales Cloud Einstein: Einstein Forecasting Enhancements
4. Partner Relationship Management: Bult Reports & Dashboard
5. Salesforce Billing: Hosted Credit Card Payments
6. Pardot: B2B Marketing Analytics Enhancements

### Service
1. Einstein Case Routing
2. Field Service Lightning: Work Rule Enhancements
3. Lightning Knowledge Enhancements
4. Omni-Channel Routing Enhancements
5. Lightning Knowledge for Einstein Bots

### Marketing
1. Transactional SMS Messaging
2. Journey Builder: In-App Messaging for Mobile Apps
3. Journey Builder: Einstein Send Time Optimization
4. Social Studio: Persona Dashboards
5. Audience Studio Connector for Interaction Studio
6. Datorama Marketplace
7. Einstein Next Best Action for Interaction Studio
8. Distributed Marketing

### Community
1. Salesforce Content Management System (CMS)
2. Community Cloud for Financial Services
3. Access Control
4. Mobile Publisher Enhancements
5. Einstein Analytics for Communities Enhancements

### Productivity
1. Salesforce Data Integration Enhancements
2. Granular Permissions
3. Einstein Analytics for Quip
4. Template Library Expansion
5. Salesforce Record Linking

### Einstein Analytics
1. Einstein Discovery: Automated Story Creation
2. Einstein Discovery: Live Model Monitoring
3. Einstein Analytics in the new Salesforce mobile app
4. Data Platform Enhancements
5. Formula Enhancements
6. Einstein Analytics for Financial Services Cloud Enhancements: Insurance
7. Einstein Analytics for Healthcare
8. Einstein Analytics for Manufacturing

### Financial Service Cloud
1. Mortgage Innovations for Financial Services Cloud
2. Document Tracking and Approvals
3. Community Cloud for Financial Services
4. Lightning Scheduler: Multi Resource Scheduling
5. Einstein Analytics for Financial Services Enhancements: Insurance

### Manufacturing Cloud
1. Sales Agreements
2. Account Based Forecasting
3. Community Cloud for Manufacturing
4. Einstein Analytics for Manufacturing

### Health Cloud
1. Provider Relationship Management
2. Life Sciences Program Management Enhancements
3. Einstein Analytics for Healthcare
4. Lightning Scheduler: Asset Scheduling
5. Account Based Forecasting

### Consumer Goods Cloud
1. Retail Execution
2. Retail Execution: Einstein Vision for Consumer Goods
3. Retail Execution: Visit Planning
4. Retail Execution: Visit Execution
5. Retail Execution: Mobile Order Capture

### Commerce
1. B2C: Page Designer
2. B2C: On-Demand Sandboxes
4. B2C: Mulesoft Accelerator for Salesforce Commerce Cloud

### Integration
1. Anypoint API Community Manager
2. Anypoint Partner Manager
3. Mulesoft Accelerator for Salesforce Commerce Cloud

### Commerce Cloud
1. Provider Relationship Management
2. Life Sciences Program Management Enhancements
3. Einstein Analytics for Healthcare
4. Lightning Scheduler: Asset Scheduling
5. Account Based Forecasting

### Consumer Goods Cloud
1. Retail Execution
2. Retail Execution: Einstein Vision for Consumer Goods
3. Retail Execution: Visit Planning
4. Retail Execution: Visit Execution
5. Retail Execution: Mobile Order Capture

### Lightning Experience
1. In-App Guidance
2. Recycle Bin
3. Salesforce Optimizer Enhancements
4. new Salesforce mobile app
5. Notification Builder Enhancements

### Platform Services
1. Real Time Event Monitoring
2. Customer 360 Data Manager
3. Managed Packages Enhancements
4. Heroku Enterprise Accounts
5. Identity Connect Enhancements

### Lightning Platform
1. new Salesforce mobile app
2. Lightning Web Components: Open Source
3. Lightning Object Creator
4. Lightning Flow Scheduler
5. Lightning Flow: Screen Component Enhancements

### Lightning Experience
1. In-App Guidance
2. Recycle Bin
3. Salesforce Optimizer Enhancements
4. new Salesforce mobile app
5. Notification Builder Enhancements

### Help Portal Enhancements
1. Trailhead Simulator
2. Trailhead Live
3. Cybersecurity Learning Hub

### Essentials Collection for AppExchange
1. Essentials Collection for AppExchange
2. Essentials In-App Help

### Success
1. Help Portal Enhancements
2. New & Refreshed Accelerators
3. Service Cloud Jump Start
4. Priority Bundle Enhancements
5. Marketing Cloud Campaign Services
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Introducing Winter ‘20

A highlight of some top features

‘20
Account Teams and Opportunity Contact Roles are now more flexible. Define your business processes by adding custom fields, triggers, or workflow rules.

*Account Teams available with purchase of Enterprise Edition or higher
*Opportunity Contact Roles available with purchase of any edition
Streamline your inside sales process with branching for call disposition categories. Whether reps speak with a prospect or leave a voicemail, the Sales Cadence moves to the next best step.

*Available with purchase of Enterprise Edition or higher and High Velocity Sales Add-on
Sales Cloud Einstein: Einstein Forecasting Enhancements

Predict sales outcomes in the way that makes sense for your business with Einstein Forecasting, now available with quarterly forecasting capabilities.

*Available with purchase of Sales Cloud Einstein
Allow partners to create their own reports and dashboards. External teams can work directly in their partner portals, reducing your operations workload and increasing transparency.
Accept credit card payments without agents handling sensitive information. Embed the billing component into Lightning app pages as well as customer and partner-facing pages.

*Available with purchase of CPQ and Billing Plus
Pardot: B2B Marketing Analytics Enhancements

Explore prospect level engagement across your marketing efforts. Gain deep insights into engagement patterns across both marketing and sales workflows.

*Available with purchase of Pardot Plus or higher
Einstein Case Routing

Resolve cases faster by automatically routing them. Based on machine learning from past cases, Einstein instantly routes the right case to the right agent.

Learn More  Watch Demo
Field Service Lightning: Work Rule Enhancements

Speed up field service assignments with Work Rule Enhancements: Extended Match. Expand your matches to include territory, skill level, and more—all to one resource.

Learn More
Lightning Knowledge Enhancements

Deliver the right answers to customers over any channel. Empower support agents to quickly preview and share knowledge articles with one click.

Learn More  Watch Demo
Omni-Channel Routing Enhancements

Customize the order that work gets routed at the field level, giving you the flexibility to create routing rules personalized to your business.
Leverage the power of Einstein Bots to surface articles based on common customer questions. Display a set of fields from the best article or a menu of the top three articles.

Learn More  Watch Demo
Essentials Collection on AppExchange

Check out our small business tools on AppExchange. Integrate products like DocuSign with Essentials and keep using your favorite business apps – all on one platform.

Learn More  Watch Demo

*Available with purchase of Essentials
Essentials In-App Help

Search in-app for help articles to get the support you need – without ever leaving Essentials. Chat directly with an Essentials team member in your first 90 days of use.

*Available with purchase of Essentials
Transactional SMS Messaging

Allow customers to send and track transactional text messages, such as purchase confirmations, receipts, or financial alerts.

*Available with purchase of Corporate or Enterprise Edition
*One message rendering per contact = one super message
Journey Builder: In-App Messaging for Mobile Apps

Create and send messages to mobile app users through Journey Builder. Allow marketers to interact directly with their mobile audience to increase engagement and drive conversion.

Learn More  Watch Demo

*Available with purchase of Enterprise, Corporate, and Professional Editions with Journey Builder Add-on
Use a Journey Builder activity to send emails to subscribers when they're most likely to open them.

Learn More  Watch Demo

*Available with purchase of Enterprise, Corporate, and Professional Editions with Journey Builder Add-on
Create a persona insights dashboard to analyze social audiences and uncover data patterns. Base your audience analysis on social listening segments or Service Cloud contacts.

*Included with purchase of any Social Studio edition
Audience Studio Connector for Interaction Studio

Personalize content based on media exposure and activate audience segments for advertising. Take advantage of real-time data and make impactful marketing decisions on the fly.

Learn More  Watch Demo

*Available with purchase of Audience Studio and Interaction Studio
Datorama Marketplace

Unify and analyze all your marketing data via pre-packaged app solutions. In addition, developers can create custom apps for marketers to discover and use on the Datorama platform.

Learn More  Watch Demo

*Available with purchase of Datorama
Einstein Next Best Action Connector for Interaction Studio

Surface consumer recommendations for Sales, Service, or Financial Services Cloud. Determine the best experience across channels and devices with Interaction Studio.

Learn More  Watch Demo

*Available with purchase of Interaction Studio and Einstein Next Best Action
Distributed Marketing Enhancements

Use custom approvals to automatically vet outgoing messages for brand compliance. Send one-off emails, at scale, to specific groups of people.

Learn More  Watch Demo

*Included with purchase of Distributed Marketing
Community Cloud
Salesforce Content Management System (CMS)

Create, manage, and store your content in a single place. Turn customer data into personalized content and deliver it to any channel.
Access Control

Grant the right level of access to the right role, improving content and design workflows across all your teams.

Learn More  Watch Demo
Use push notifications to lead customers to the correct page in your app. Import Contacts into your app directly from your phone—no more manual reentry.

*Available with purchase of Mobile Publisher for Community Cloud
*Community Cloud license required
Community Builder Enhancements

Use Flexible Layouts to design pages and style them the way you want, with drag-and-drop components for any section. Build pages without writing a single line of code.

Learn More  Watch Demo

*Community Cloud license required
Discover relevant Community data patterns with the power of Einstein Analytics. Make smarter customer engagement decisions and focus Partner and Reseller energy.

*Available with purchase of Einstein Analytics for Communities Plus
Community Cloud for Financial Services

Use a prebuilt Community Cloud template with components and flows that helps independent insurance agents access their most important KPIs and metrics.

Learn More  Watch Demo
Productivity
Salesforce Data Integration Enhancements

Make it easy for teams to discuss live data with embedded Salesforce Reports and List Views. Log calls in Quip and sync them back to Salesforce without leaving the Quip app.

Learn More  Watch Demo

*Available with purchase of 1+ Quip for Salesforce license
Protect your data by providing the right level of access to the right people. Enjoy seamless access to standalone Quip docs or docs associated with specific Salesforce records.

*Available with purchase of 1+ Quip for Salesforce license
Einstein Analytics for Quip

Discuss insights, collaborate, and drive action faster than ever with the Einstein Analytics dashboards embedded in Quip.

Learn More  Watch Demo

*Available with purchase of 1+ Quip for Salesforce license
*Available with purchase of Einstein Analytics Growth or Plus
Use the expanded template library for use cases like Account Plans, Opportunity Notes, or Pricing Proposals. Auto-fill templates with Salesforce data to bypass copying and pasting.

*Available with purchase of Quip license
Salesforce Record Linking

Connect your Quip docs and Salesforce records. Tie important content back to your CRM.

Learn More
Watch Demo

*Available with purchase of 1+ Quip for Salesforce license
B2C Commerce: Page Designer

Build premium commerce experiences with clicks, instead of code. With drag-and-drop components, you can bring your ideas to market faster than ever.

Learn More

Business User
B2C Commerce: On-Demand Sandboxes

Bring up a copy of your site to deploy code, try new integrations, or rapidly apply new styles without impacting your production site.

Learn More
Offer curated product sets based on previous customer behavior. Allow shoppers to complete an entire "look" when you display outfits on product pages and offer them recommendations.
B2C Commerce: MuleSoft Accelerator for Salesforce Commerce Cloud

Jumpstart your commerce project with templates for common use cases like social marketplace or chatbots. Harness over 100 third-party apps and easily integrate the tools you need.
Platform Services
Real-Time Event Monitoring

Stream Salesforce events in real time that alert you to suspicious behavior. Build transaction security policies with the no-code condition builder and enhance them with APEX.

Learn More  Watch Demo

*Available with purchase of Shield or Event Monitoring Add-on
Customer 360 Data Manager

Register multiple accounts to map data to the Salesforce Information Model. Create a 360 ID and reconciled customer profile, all on one secure, trusted hub.

Watch Demo

*Add on for Platform Services
Managed Packages Enhancements

Let ISV Partners build, iterate, and distribute new business apps even faster with a source-driven packaging model that is API-ready and makes code sharing easier.

Learn More
Heroku Enterprise Accounts

Manage security, usage, and entitlements across enterprise teams with new controls and tooling.
Identity Connect Enhancements

Get fast and easy user synchronization, at scale, between Microsoft Active Directory and Salesforce through an improved architecture and a new diagnostic-centric experience.
Lightning Experience
In-App Guidance

Help onboard and directly engage with your users in Lightning Experience. Create prompts to URLs of your choice with your own content and action buttons.

Learn More  Watch Demo
Recycle Bin

Manage your deleted records in Lightning Experience. Admins and users can restore deleted records. Admins can empty or permanently delete records.

Learn More  Watch Demo
Salesforce Optimizer Enhancements

Receive personalized recommendations to improve features, clean up customizations, and drive feature adoption. Save time with scheduled runs, trending, and quick links to setup pages.
New Salesforce Mobile App

Build custom apps with ready-made or custom components. Customize the look, feel, and functionality of your app, on desktop or mobile, to make your data work for you.

Learn More  Watch Demo

Business User
Empower admins to create custom notifications with clicks not code. Route notifications to Communities, or Field Service Lightning, in addition to Salesforce for iOS and Android.

Learn More  Watch Demo
New Salesforce Mobile App

Build custom apps with ready-made or custom components. Customize the look, feel, and functionality of your app, on desktop or mobile, to make your data work for you.

Learn More  Watch Demo
Empower developers to explore open source code for Lightning Web Components, customize frameworks to meet their needs, and build Enterprise-ready web components on any platform.
Lightning Object Creator

Turn spreadsheets, like Microsoft Excel, Google Sheets, or comma-separated value (.csv) files, into cloud-based apps with just a few clicks.
Lightning Flow Scheduler

Run a Flow daily, weekly, or on a specific date against a set of records you select, which reduces the risk of running into limits.
Lightning Flow: Screen Component Enhancements

Create fast and powerful guided interactions with support for web-standard Lightning Web Components and conditional field visibility for building dynamic screens.

Learn More  Watch Demo
Einstein Analytics
Einstein Discovery: Automated Story Creation

Create a story by selecting a dataset and Einstein will do the rest. AI quickly delivers the data insights you're looking for.

*Available with purchase of Einstein Analytics Plus and Einstein Predictions
Einstein Discovery: Live Model Monitoring

Keep tabs on multiple models deployed in your organization to ensure accuracy and receive alerts if any underperforming models are detected.

Learn More  Watch Demo

*Available with purchase of Einstein Analytics Plus and Einstein Predictions
Einstein Analytics in the new Salesforce mobile app

Get in-context insights right where you work, from embedded dashboards to accessing your data through Search, Favorites, and Chatter--now available in Salesforce for iOS and Android.

*Available with purchase of Einstein Analytics Growth or Plus
Data Platform Enhancements

Get improved query times and up to 5x faster processing speeds with our new distributed back end. Refresh datasets faster by running Dataflows in parallel.

*Available with purchase of Einstein Analytics Growth or Plus
Formula Enhancements

Formulas will now support using string values to create labels, buckets, and image URLs without having to write any SAQL.

*Available with purchase of Einstein Analytics Growth or Plus
Einstein Analytics for Financial Services Enhancements: Insurance

Extend a complete intelligence platform for financial services into insurance. Help agents and sales managers grow their business and understand their customers and policies.

Learn More  Watch Demo

*Add on for Financial Services Cloud
Einstein Analytics for Healthcare

Get predictions and recommendations with pre-built templates for providers and payers that will help make every patient and member interaction smarter and more personalized.

Learn More

*Add on for Health Cloud

Business User
Einstein Analytics for Manufacturing

Bring AI-Powered intelligence and insights to day to day operations. Take actions based on manufacturing analytics measured across your entire business.

*Available with purchase of Einstein Analytics
Enablement
Get a hands-on experience with Marketing Cloud in Trailhead. Learn how to create email templates, send emails, and more.
Access free livestream learning and on-demand content. From Salesforce certification to Q&A with experts, learners can benefit from instructor-led tutorials, anytime.
Cybersecurity Learning Hub

Access free cybersecurity learning. Take advantage of Trailhead's new focus on cybersecurity learning for companies and individuals.
Capture and share borrower information across lines of business. Sample templates provide a guided UI flow for borrowers and loan officers to complete mortgage applications.
Document Tracking and Approvals

Streamline customer engagements by tracking documents and approvals for use cases like mortgage applications. Enable your customers to upload files and see the status of each document.

Learn More  Watch Demo

Business User
Use the Portal for Independent Insurance Agents, which includes a prebuilt template, components, and flows, to help users access their most important KPIs and metrics.
Lightning Scheduler: Multi-Resource Scheduling

Improve customer engagement with precision scheduling that allows you to assemble multiple resources for a customer appointment, based on each resource’s skills and availability.

Learn More  Watch Demo

*Add on for Sales Cloud, Service Cloud, Lightning CRM, Community Cloud, Health Cloud, or Financial Services Cloud
Einstein Analytics for Financial Services Enhancements: Insurance

The complete intelligence platform for financial services extends into insurance. Provide agents and sales managers with best-practice analytics to grow their book of business.

Learn More  Watch Demo

*Add on for Financial Services Cloud
Health Cloud
Provider Relationship Management

Strengthen provider relationships and gain a full view of your provider network from one place. Improve provider-centered processes like physician search, onboarding, and management.

Learn More  Watch Demo
Maximize the impact of your life sciences care programs and patient services. Capture eSignatures to stay compliant, and easily manage authorization and consent forms.

Learn More  Watch Demo
Einstein Analytics for Healthcare

Get AI-powered insights with a complete intelligence platform for providers and payers. Use pre-built templates to get predictions and recommendations faster.

*Add on for Health Cloud
Easily book and manage internal healthcare assets like rooms and equipment with Asset Scheduling. Reserve assets like MRI machines or dialysis chairs within existing workflows.

*Add on for Health Cloud
Account Based Forecasting

Improve medical device sales forecasting and gain a clearer picture of your business. Create account and product specific forecasts and efficiently manage approvals.
Manufacturing Cloud

'20
Manufacturing Cloud

Deliver predictability and transparency across your ecosystem. Now, manufacturers have a tailor-made CRM solution to align sales and operations, unify account planning and forecasts, and deliver greater transparency and collaboration — all on a single platform.

Learn More
Surface data housed in ERP or Order Management Systems and combine it with the terms negotiated with your customer to create a unified view. Align sales and operations for greater visibility into your run-rate business, making transactions, profits, and revenue margins more predictable.
Account-Based Forecasting

Get a unified view of your new and run-rate business with account based forecasting. Now sales, finance, operations, and product teams can collaborate to create more accurate forecasts and improve predictability.

Learn More  Watch Demo
Community Cloud for Manufacturing

Accelerate planning with transparent partner collaboration. Create more accurate production and revenue forecasts between partners and your company.
Einstein Analytics for Manufacturing

Bring AI-Powered intelligence and insights to day to day operations. Take actions based on manufacturing analytics measured across your entire business.

*Available with purchase of Einstein Analytics
Consumer Goods Cloud

'20
Create closer connections across the entire value chain. Transform how you collaborate with retail partners to drive growth and deliver on your brand promise.
Retail Execution

Help field reps turn every store into the perfect store, delivering stocked shelves with the right prices and promos. Spend less time on operations and more time building relationships.

Learn More  Watch Demo

Business User
Retail Execution: Einstein Vision for Consumer Goods Cloud

Accelerate inventory, planogram, and merchandising compliance checks with AI to increase productivity and audit accuracy.
Retail Execution: Visit Planning

Optimize store visits and drive efficiency by providing field reps with essential data, including store name, location, visit time, and previous visit details.

Learn More  Watch Demo
Retail Execution: Visit Execution

Customize templates based on individual store or store segment types. Ensure onsite task completion, from inventory and planogram checks to return order processing and surveys.

Learn More  Watch Demo  Business User
Retail Execution: Mobile Order Capture

Make in-store order capture easier than ever. Access and input important data such as category, product, quantity, pricing, discounts, and promotions—all from a mobile device.
Help Portal Enhancements

Get the answers you need faster than ever with better live chat UI, improvements to case management, and case scheduler capabilities. Plus, Ask Blaze is smarter than ever.
New & Refreshed Accelerators

Take advantage of 1-on-1 coaching sessions with Salesforce Specialists including new Accelerators for Service Cloud, Heroku, and Marketing Cloud.

Learn More  Watch Demo
Service Cloud Jump Start

Get up and running with Service Cloud within weeks. Implementation experts can set up your environment with key business processes, features, and fields.

Learn More  Watch Demo

*Available with purchase of Service Cloud
Priority Bundle Enhancements

Take advantage of extended Premier Priority coverage for protection of your most critical business processes in Sales Cloud, Service Cloud, Marketing Cloud, and now, Heroku.

*Available with purchase of Premier Priority edition
Maximize key Marketing Cloud features with the help of expert services. Whether you're new to Marketing Cloud or diving into advanced usage, this is sure to supercharge your campaigns.

*Available with purchase of Marketing Cloud
Integration
Anypoint API Community Manager

Build a developer community around your APIs. Engage developers through member forums, chat, or case management. Create a personalized branded experience with clicks, not code.

Learn More  Watch Demo

*Add-on for Mulesoft Anypoint Platform
Anypoint Partner Manager

Connect to 3rd party suppliers and distributors across your value chain with an integrated B2B solution. Increase operational resilience through end-to-end transaction visibility.

Learn More

*Add-on for Mulesoft Anypoint Platform
MuleSoft Accelerator for Salesforce Commerce Cloud

Harness out-of-the-box templates for common use cases like social marketplaces or chatbots. Jump-start your commerce implementation with connectors to 100+ third-party systems.

*Available with purchase of Mulesoft Anypoint Platform
Thank You!

Learn more at salesforce.com/winter20