Winter ’21 Release in a Box

A ready-to-use presentation, highlighting top innovations. Perfect for Admins, Business Users, and Developers to share with their organization.
Forward-Looking Statements

Statement under the Private Securities Litigation Reform Act of 1995:

This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, the one-time accounting non-cash charge that was incurred in connection with the Salesforce.org combination; stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth and sustainability goals. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the company’s results could differ materially from the results expressed or implied by the forward-looking statements we make.

The risks and uncertainties referred to above include -- but are not limited to -- risks associated with the effect of general economic and market conditions; the impact of geopolitical events; the impact of foreign currency exchange rate and interest rate fluctuations on our results; our business strategy and our plan to build our business, including our strategy to be the leading provider of enterprise cloud computing applications and platforms; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; the competitive nature of the market in which we participate; our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our service performance and security, including the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate potential security breaches; the expenses associated with new data centers and third-party infrastructure providers; additional data center capacity; real estate and office facilities space; our operating results and cash flows; new services and product features, including any efforts to expand our services beyond the CRM market; our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to realize the benefits from strategic partnerships, joint ventures and investments; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within the company's strategic investment portfolio; our ability to execute our business plans; our ability to successfully integrate acquired businesses and technologies, including delays related to the integration of Tableau due to regulatory review by the United Kingdom Competition and Markets Authority; our ability to continue to grow unearned revenue and remaining performance obligation; our ability to protect our intellectual property rights; our ability to develop our brands; our reliance on third-party hardware, software and platform providers; our dependency on the development and maintenance of the infrastructure of the Internet; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; factors related to our outstanding debt, revolving credit facility, term loan and loan associated with 50 Fremont; compliance with our debt covenants and lease obligations; current and potential litigation involving us; and the impact of climate change.

Further information on these and other factors that could affect the company’s financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company’s website at www.salesforce.com/investor.

Salesforce.com, Inc. assumes no obligation and does not intend to update these forward-looking statements, except as required by law.
What’s Included?

**Presentation Deck***

This deck includes high-level summaries of the top innovations for each product.
Select desired slides for a personalized presentation.

**Helpful Links**

Most innovations contain links to 2-3 minute digestible demos and/or links to learn more.

**Additional Information**

Use the color-coded legend to choose the appropriate slides for your audience (Admin, Business User, Developer).

*Not to be confused with the Release Overview Deck, which takes a deeper dive into fewer features, and is tailored to admins and developers.*
How Do I Learn More?

1. Visit salesforce.com/releases: click here
2. Watch demo videos on the YouTube playlist: click here
3. Take the Release Highlights Trail: click here
4. Dive into the details with Release notes: click here
5. Stay up to date by joining the customer Release Readiness Trailblazers Community Group: click here
How Do I Play by the Rules?
When using this document, you agree that you will follow the below guidelines.

**Reorder, don’t revise**
You are welcome to remove or reorder slides from the deck, but please do not edit the text itself. We want to ensure the accuracy of the content remains intact.

**Keep our characters safe**
Please do not copy branded images, including Salesforce banners or logos from this deck. Our characters feel most comfortable in context :)

# Table of Contents

<table>
<thead>
<tr>
<th>Work.com</th>
<th>Sales</th>
<th>Service</th>
<th>Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communities</td>
<td>Employee Experience</td>
<td>Commerce</td>
<td>Platform - Services</td>
</tr>
<tr>
<td>Platform - Applications</td>
<td>Apps - Lightning Experience</td>
<td>Apps - Application Development</td>
<td>Analytics</td>
</tr>
<tr>
<td>Enablement</td>
<td>Industries - Financial Service Cloud</td>
<td>Industries - Health Cloud</td>
<td>Industries - Manufacturing Cloud</td>
</tr>
<tr>
<td>Industries - Consumer Goods Cloud</td>
<td>Industries - Sustainability Cloud</td>
<td>Salesforce.org - Nonprofit Cloud</td>
<td>Salesforce.org - Education Cloud</td>
</tr>
<tr>
<td>Salesforce.org - Philanthropy Cloud</td>
<td>Success Cloud</td>
<td>Integration (MuleSoft)</td>
<td></td>
</tr>
</tbody>
</table>
Work.com

- Queue Management
- Broadcast Messaging
- Digital Trust Cards
Queue Management

Businesses today need a trusted tool that is flexible enough to support the changes coming in the near future as we continue returning to work. Introducing Queue Management, empowering safe and seamless in-person experiences as the world returns to work. Queue Management is a Salesforce-native tool that helps businesses scale onsite capacity in order to meet urgent needs and ensure compliance with local regulations.

Queue Management is now part of Asset Scheduling as an addon in Sales Cloud, Service Cloud, Communities, Financial Services Cloud, Health Cloud, Manufacturing Cloud, Consumer Goods Cloud. It may also be sold as a net new product when purchased with Broadcast Messaging.
Broadcast Messaging allows companies to proactively reach customers faster and more effectively on their preferred channel, SMS. Whether it's an update on hours of operation, reminder to wear masks, or notifying you of your place in line, Broadcast Messaging allows you to easily select a recipient list, choose from pre-built messaging templates and send messaging in bulk, in just a few clicks.

Broadcast Messaging is part of the existing Digital Engagement SKU (of which you need a core license to use) OR can be purchased by net new customers (without needing a DE or core license).
Digital Trust Cards allow companies to publish all of their safety protocols, like social distancing policies, cleaning guideline, amenity scheduling and more in a eye catching way. You can easily embed these cards into any digital property, like checkout pages, with a simple line of code so you can remove barriers to purchase, while deflecting questions that may otherwise have gone to you support team.
Sales

- Opportunity Deal Change Highlights
- Multi-Cloud Support for Billing
- High Velocity Sales Enhancements
- Lead Score Global Models
- Multi-Account Management
- Territory Planning Enhancements
Highlight what has changed in the pipeline to easily see which deals grew or shrank, and which deals were pushed out or pulled in.

Available with purchase of Sales Cloud
Multi-Cloud Support for Billing

Now you can create invoices and bill from orders from CPQ, from B2B Commerce, from Service Cloud work orders, from Vlocity quotes, or any other quoting/ordering system that customers may have.

Available with purchase of Salesforce Billing
HVS now offers you the ability to organize and share sales cadences in folders, while also providing the convenience to pause sales cadences and change step ownership. In addition, users can insert free time into emails, for scheduling directly from Lightning.
Lead Score Global Models

With Global Models you now have the ability to automatically surface Einstein Lead Scoring for all your leads. Global models will provide a predictive lead scoring option for customers that did not have a good data shape, or enough of the right kinds of data to create a valid, accurate model.

Learn More

Available with purchase of Sales Cloud
Multi-Account Management

Managing multiple accounts has never been easier for dealer, agent, or franchise networks, or for multi-location firms. Now, you can efficiently self-manage user administration across multiple accounts – including user access, passwords, and permissions. Then, with just a few clicks, individuals can quickly navigate between different accounts they have access to, all without needing to log out and back in.

Learn More

Available with purchase of Customer Community+, Sales Cloud PRM and External Apps
Territory Planning Enhancements

With Territory Planning, you now have the ability to create and compare scenarios based on both the number of Territories and the distribution of Attributes. This feature results in new Alignments with optimized Territories.

Learn More

Available with purchase of Sales Cloud and Maps
Service

- Field Service: Time Sheets
- Service Setup Assistant
- Omni Supervisor Enhancements
- Einstein Bots Enhancements
- Broadcast Messaging
With Time Sheets, service managers can create, edit and take action on your employees’ time and expenses. This is all connected to your field service operation, allowing you to have the visibility into how your mobile employees are working. View time sheets, log working hours, and submit time sheets for approval on the go.
Realize faster time to value for customer service delivery with Service Cloud. Now, it’s easier than ever to get started with a 2-step setup, out-of-the-box configuration, and built-in agent productivity best practices.
Omni Supervisor Enhancements

Empower service supervisors to assist agents in real-time with the latest Omni Supervisor Enhancements. Now supervisors can view voice transcripts as the phone call is in progress so they can jump in and help agents when needed.

Available with purchase of Service Cloud Voice with Amazon Connect
Einstein Bots Enhancements

Setting up and managing an AI-powered chatbot is easier than ever with a new guided setup and an input recommender.
Broadcast Messaging

Communicate timely information quickly. Keep customers informed with personalized notifications, alerts, and reminders directly to their messaging inbox, manually or through automation.

Available with purchase of Service Cloud or Sales Cloud EE or UE and Digital Engagement
Marketing

- Customer 360 Audiences
- Interaction Studio: Einstein Personalization Recipes
- Interaction Studio: Einstein Personalization Decisions
- Journey Builder: Path Optimizer
- Datorama Connector for Pardot
- Datorama Integration with Tableau
- New Pardot Email Experience
Customer 360 Audiences

Customer 360 Audiences, our enterprise-wide customer data platform solution, enables marketers to capture, unify, segment and activate all their customer data. It provides marketers a single source of truth of their customer and makes that data available for creating personalized experiences across every touchpoint.

Learn More  Watch Demo
Interaction Studio Enhancements

With Einstein Personalization Recipes, business users can customize, test, and implement machine-learning algorithms that consider an individual's attributes, behaviors, affinities, and intent, to determine and deliver maximally relevant, individualized recommendations. Einstein Personalization Decisions evaluates both the likelihood of someone engaging with a particular offer or action and the business value of that offer or action to the company.

Available with purchase of Interaction Studio
Path Optimizer unlocks marketing experimentation in new ways by testing journey paths, not just message content. Run one or multiple tests in a journey, choosing winning paths by engagement or on demand. New contacts only receive the winning path. Continue to run tests to gain insights and optimize your customers’ experience.

Learn More
Datorama Connector for Pardot

The Datorama Connector for Pardot enriches the existing Pardot API integration by providing new Lead Generation data sets and additional fields for email campaign data. This allows Pardot users to leverage Datorama's powerful analytics, visualization, and reporting tools to get a complete leads funnel and to measure better their campaigns.

Available with purchase of Datorama and Pardot
New Pardot Email Experience

Create email templates and emails in a modern, drag-and-drop builder, send and resend emails from the Pardot Lightning App, and view individual email performance and aggregated metrics across multiple sends.

Watch Demo
Communities

- Salesforce CMS Integration with new Pardot email experience
- High Scale Content Enhancements
- Experience Builder Enhancements
- Salesforce CMS Enhancements
- External Managed Accounts
Salesforce CMS Integration with new Pardot email experience

Salesforce Content Management System (CMS) will now come with out of the box integration with new Pardot email experience to seamlessly compose Pardot emails using images from CMS. Distribution of collections and content can be leveraged across commerce, communities, marketing and external sources.

Learn More  Watch Demo

Available with purchase of Salesforce Content Management System
High Scale Content Enhancements

Users can now experience high scale delivery of headless content using out of the box Content Delivery Network (CDN) Partner (Akamai) or bring their own CDN and customize to fit with Salesforce CMS. High Scale Content Enhancements ensure fast and reliable content delivery with every publishing consistently.

Learn More  Watch Demo
Users can now seamlessly personalize record detail pages using the values of fields on the record. Additionally, users can organize pages and web URLs in alignment with their content folders. Customers may now easily leverage knowledge base articles in CRM-Based Collections with no customization needed.
Empower content managers to easily create and organize content faster with the latest Salesforce CMS enhancements. CMS will now allow users to create folders for the different variations and topics of content they need to serve across channels. Easily bulk, integrate, and surface images with Binary IDs.

Available with purchase of Salesforce Content Management System

Learn More
External Managed Accounts

Internal users, admins or account owners, can allow portal users to access target accounts with External Managed Accounts. Now, portal users can also get assigned delegated admin permissions to their target accounts and easily switch accounts to operate in that capacity.

Available with purchase of Community Cloud (Partner Communities). “Buy For” access requires customers to buy B2B Commerce.
Employee Experience

- Template Library
- Data Mentions
- Template Usage Reporting Enhancements
Template Library

The new template library improves the templating user experience with an easy way to access, store, organize, and publish custom templates for all your critical business processes.

Learn More  Watch Demo

Available with purchase of Quip
Live Data Mentions allow users the ability to @mention any standard and custom Salesforce fields in-line in a Quip document. A popover is available, allowing users to edit specific records.
Template Usage Reporting Enhancements

Track who is editing, commenting on, and viewing Quip templates and documents in Salesforce at the individual user level.
Commerce

- B2B Commerce on Lightning Experience Enhancements
- Salesforce Order Management Enhancements
- Trust Enhancements
- B2C Commerce Enhancements for Grocery
- Einstein Product Recommendations Enhancements
Browse without logging in, to increase flexibility, extend site reach, and provide SEO capabilities. Sizes, colors, and more can also be shown on one product detail page, reducing SKU proliferation and providing a simpler buying experience. A centralized pricing workspace enables users to find data quickly using advanced filters, and perform bulk actions for mass assignments.

Available with purchase of B2B Commerce

Learn More  Watch Demo
Return Merchandise Authorization (RMA) workflows now provide B2C retailers with more complete product support for return/refund scenarios and empower shoppers with self-service options for RMA tracking. With exception management, you now have higher visibility into the order lifecycle to better identify, troubleshoot, and solve business logic failures in relation to the fulfillment lifecycle.

Available with purchase of Salesforce Order Management
Trust Enhancements

With the latest Trust Enhancements for B2C, multi-factor authentication and card skimming detection will be rolled out across all customers on top of the Salesforce authenticator app to provide even more availability, scalability, security, and performance global customers require.

Learn More  Watch Demo

Available with purchase of B2C Commerce
B2C Commerce Enhancements for Grocery

This new solution kit helps grocers deploy even faster and includes shoppable product list pages, an expanded catalog, and new storefront template designs. Additional capabilities include B2C pricing and promotions engine enhancements for store specific pricing as well as enhanced scale required by grocers.

Learn More  Watch Demo
Einstein Product Recommendations Enhancements

Merchants using Einstein can now take advantage of the Complete the Set recommender in the configurator tool. Merchandisers can increase productivity by easily creating coordinated sets or "Looks" in minutes rather than months, with easy rollout. In addition to apparel, Complete the Set is now available for beauty, cosmetics, and home furnishings.

Learn More

Available with purchase of B2C Commerce
Einstein for Commerce
Platform - Services

- Salesforce Optimizer Enhancements
- Security Center
- Composite Graph API
- Privacy Center
- Multi-Factor Authentication Assistant
Salesforce Optimizer Enhancements

Use Optimizer’s schedule run to track the latest info on your org’s health once a month and visualize metrics such as file storage limit, data storage limit, and static resource limit through a line graph built on that data. Improve your org's security through metrics including Critical Permission Assignment, Profile Assignment, and Incomplete Release Update.
Maintaining security, privacy, and governance policies across multiple tenants is critical and often time-intensive work. Enter Security Center, a tool for monitoring all of your tenants’ security settings in one app. Use Security Center to see who’s logging in with which authentication protocols, review permission assignment changes, and more. You can even review average and per-tenant health check scores without going to each tenants’ Health Check page.

Available with purchase of Platform License
Composite Graph API

The Graph API is the latest addition to the Composite REST family and is designed for optimal processing of CRUD operations on related sObjects. This API extends the reach of standard Composite requests by allowing you to assemble more complicated and complete graphs of related records.

Learn More

Available with purchase of Platform Starter
Privacy Center

Managing data privacy compliance is complex, time consuming, and critical. This suite of tools simplifies compliance with Data Retention, Data Subject Rights and Consent Events, (in later versions) maximized control with Preference Centers, and discover trends with Data Privacy Analytics to help keep data compliance and privacy at the center of their business.

Learn More

Available with purchase of Platform license
Multi-factor authentication (MFA) is one of the most effective ways to help protect your Salesforce user accounts, and ultimately your data. This Assistant is your hub for all the best practices, recommended activities, and resources you need to successfully enable and roll out MFA to your users.
Platform - Applications

- Salesforce Feedback Management: Merge Field Branching
- Salesforce Feedback Management: Email Survey Personalization
- Salesforce Surveys: Survey Templates
- Salesforce Surveys: Mass Send API
- Lightning Scheduler: Calendar Integration
Leverage branching logic based on Salesforce records to create an even more personalized, accurate survey experience. Use merge fields to send survey takers to different pages based on an individual Salesforce record, empowering you to spend less time creating different survey versions, and more time gathering in-depth survey responses.

Learn More  Watch Demo
Salesforce Surveys: Survey Templates

Eliminate the need to create surveys from scratch. With Survey Templates, save your branding and questions as pre-built templates for later use, reducing the time spent designing surveys and maintaining consistent designs across your surveys.

Available with purchase of Financial Services Cloud, Health Cloud, Sales Cloud, Service Cloud, Community Cloud, Platform, and Lightning CRM SKUs
Salesforce Feedback Management: Email Survey Personalization

Make survey invitation emails even more contextual by adding Merge Field questions right into the email. Improve the survey taker experience and survey validity with Merge Fields that refer to Salesforce records such as case number, date of service, name of service provider, and more.

Learn More
Salesforce Surveys: Mass Send API

Quickly send surveys to large lists of users, contacts or leads, without having to input email lists into the Survey Builder. Relate your surveys to associated objects and add metadata for improved tracking.

Available with purchase of Financial Services Cloud, Health Cloud, Sales Cloud, Service Cloud, Community Cloud, Platform, and Lightning CRM SKUs

Learn More
Ensure resource availability and appointments are correctly reflect on all calendars with the External Calendar Integration. Read and write appointments as platform events that are shared to and from external calendars such as Outlook and Google Calendar.
Apps - Lightning Experience

- Dynamic Experiences Enhancements
- Lightning Flow: Trigger on Delete
- Lightning Flow Enhancements
- In-App Guidance Enhancements
- Salesforce mobile app Enhancements
Dynamic Experiences Enhancements

Our answer to the #1 TTC and most voted idea, dependant page layouts. Dynamic Forms allows you to configure forms right within App Builder and set visibility rules on sections and fields. Dynamic Actions have been upgraded so you can add, reorder, and remove actions directly from within the Lightning App Builder, with a modern UI and live preview.

Learn More  Watch Demo
Lightning Flow: Trigger on Delete

It's been five years and 24,000 IdX points in the making, but it's finally here: Flows can be directly triggered by record delete operations. Update related records, clean out unneeded records, and recalculate rollup summaries without writing a line of code.

Learn More
Lightning Flow Enhancements

We are making it simpler than ever to reference data in Lightning Flow. Custom queries and traversals allow you to drill down to the right data while entry criteria allow you to trigger process runs only on the selected data, greatly improving efficiency and performance.

Learn More

Available with purchase of Platform License
In-App Guidance Enhancements

Admins can now choose color options for prompts or walkthroughs based on their Org theme or App branding. No need to worry about color choices - accessibility is built in and guaranteed.

Learn More

Available with purchase of Platform License for single Prompts, myTrailhead for Walkthroughs
Salesforce Mobile App Enhancements

Users are now able to perform searches scoped to the specific object they're currently viewing and will now be able to see a native activity timeline half sheet on Opportunity record home. Additionally, users will now be able to view their Events in a calendar month view.

Available with purchase of Platform License

Learn More  Watch Demo
Apps - Application Development

- Lightning Web Components for Mobile SDK
- Heroku Postgres: Streaming Data Connectors
- Safe Navigation Operator for Apex
- Platform Events: New Publish Status Channel
Lightning support is the #1 request of Mobile SDK customers. Starting with Mobile SDK 8.2, customers will now be able to including Lightning Web Components into their custom mobile applications.
Heroku Postgres: Streaming Data Connectors

Monitor multiple Postgres tables for writes, updates, and deletes, and then writing each change to an Apache Kafka topic. Like Heroku Postgres and Apache Kafka on Heroku, the streaming data connector is fully-managed, has a simple and powerful user experience, and comes with our operational excellence built-in every aspect of the service.

Learn More  Watch Demo

Available with purchase of Heroku Data Add-on Credit SKU
Safe Navigation Operator for Apex

Introducing a new language operator in Apex to make handling null values dramatically simpler and easier.

```java
String profileUrl = null;
if (user.getProfileUrl() != null) {
    profileUrl = user.getProfileUrl().toExternalForm();
}
String profileUrl = user.getProfileUrl()??.toExternalForm();
```

```java
results = [SELECT Name FROM Account WHERE Id = :accId];
if (results.size() == 0) { // Account was deleted 
    return null;
}
return results[0].Name;
return [SELECT Name FROM Account WHERE Id = :accId]??.Name;
```
Analytics

- Einstein Discovery: Fast Start Templates
- Einstein Analytics Connectors for Snowflake
- Einstein Discovery: Scheduled Model Refresh
- Insights Tracking
- Table Visualization Enhancements
- Write to external databases in Tableau Prep

- Einstein Analytics for Financial Services Enhancements
- Einstein Analytics for Consumer Goods Enhancements
- Einstein Analytics for Manufacturing Enhancements
Einstein Discovery: Fast Start Templates

Not sure where to begin using Einstein Discovery? When creating a story, simply choose one of the new Einstein Discovery fast start templates. Einstein Discovery will build the training dataset, using all the best practices, and build an iteration of an Einstein Discovery story.

Available with purchase of Einstein Analytics

Learn More  Watch Demo

Business User
Unlock your Salesforce data with the new Snowflake connectors. Write your Salesforce objects directly with SyncOut for Snowflake or write any output from a recipe with The Output Connector for Snowflake.

Available with purchase of Einstein Analytics

Learn More  Watch Demo
Automate some of the manual steps required to update your Einstein Discovery Predictive models with Scheduled Model Refresh. Schedule the frequency of how often you want your Einstein Discovery deployed model to retrain and get a refreshed story in the form of a new story version as well as a newly deployed model version.
Insights Tracking

Now, all your KPIs and business metrics are available to you in one easy-to-access place, on-demand. Visualize and discover trends by keeping track of how your metrics change over time. Subscribe to dashboard widgets and receive a daily or weekly email with snapshots of your most important charts and KPIs, while Notifications can be set to alert you as the KPIs changes, immediately.

Learn More  Watch Demo

Available with purchase of Einstein Analytics
Discover insights and take action quicker with enhancements to the table visualization for both desktop and mobile. Tables on the desktop can now have 1-click actions, freeze columns, and collapsible tables. While on mobile, Tables are now represented in a totally new mobile-friendly way so it’s easier than ever to visualize and understand the details of your business insights while you are on the go.
Write to External Databases in Tableau Prep

Manage trusted data at scale with new write to database capabilities in Tableau Prep. You can now store your prepared data from Prep Builder in a central location that can be leveraged throughout your organization. Use the existing database investments and governance policies you have in place to scale prepped data and make it immediately available for analysis.

Watch Demo
Enablement

- Einstein Recommendations for Trailhead
- Trailhead GO Enhancements
- New Skills for the New Normal trailmix
- myTrailhead Content Kits for Equality
- In-App Guidance Enhancements
Einstein Recommendations for Trailhead

Get the next best steps for your learning journey with new personalized, intelligent recommendations from Salesforce's industry-leading AI.

Learn More  Watch Demo
Trailhead GO Enhancements

Schedule recurring daily reminders on the Trailhead GO iOS app to develop your learning routine.

Learn More
New Skills for the New Normal Trailmix

Discover how our free Trailhead content empowers businesses and Trailblazers to navigate the future of work by going digital fast and reskilling for the jobs of today and tomorrow.

Learn More
myTrailhead Content Kits for Equality

New equality and inclusion content templates allow you to quickly stand up learning for your entire organization, and cultivate a culture of equality.

Learn More
In-App Guidance Enhancements

Admins can now choose color options for prompts or walkthroughs based on their Org theme or App branding. No need to worry about color contrasts - accessibility is built in and guaranteed.

Learn More

Available with purchase of Platform License for single Prompts, myTrailhead for Walkthroughs
Industries - Financial Services Cloud

- Compliant Data Sharing
- Community Cloud for Financial Services Enhancements
- Einstein Analytics for Financial Services Enhancements
- Actionable Relationship Center Enhancements
Compliant Data Sharing

Ensure client engagement and deal data containing material non-public information (MNPI) is shared in a compliant manner. Define rules for what client-related data can be shared with which team members based on the role they play in the context of a client engagement.
Community Cloud for Financial Services

Enhancements

Allow clients to manage mortgage applications, loans, and financial accounts using the pre-built Portal for Financial Clients. Financial institutions can enhance client relationships by providing self-service capabilities such as initiating loan applications, uploading documents, monitoring application status, viewing frequently asked questions, and requesting help with applications or loans by logging a case, which is seamlessly integrated with Salesforce case management. Clients can also use Chatter to communicate back and forth with loan officers and relationship managers in a compliant manner. The portal is completely configurable using community builder and admins can easily add any additional components, flows, and business processes from Financial Services Cloud.
Einstein Analytics for Financial Services Enhancements

Get AI-powered insights embedded where you work. Now, the complete intelligence platform for financial services extends into mortgage, with best-practice analytics for loan officers to better understand loan applications and loans.
Actionable Relationship Center Enhancements

Better manage relationships with the ability to create, edit, and remove account-account, contact-contact, and account-contact relationships directly in the Actionable Relationship Center.

Learn More  Watch Demo

Available with purchase of FSC
Industries - Health Cloud

- Intelligent Document Automation
- Sales Visit and Inventory Management for Mobile
Simplify the document management process and reduce manual data entry by managing all patient and member forms from one place, from intake through processing. Forms are automatically routed to the right queue for faster review and processing on a digital, HIPAA-compliant workspace to get patients the right care and services faster.
Empower sales reps with new visit and inventory management from a mobile-first experience. Create and manage new sales visits on the go and see product and inventory data for upcoming visits. Close product gaps faster by proactively requesting transfers and replenishment orders from the Intelligent Sales app for Medical Devices.
Industries - Manufacturing Cloud

- Einstein Analytics for Manufacturing Enhancements
- Account-Based Forecasting Enhancements
Get a 360 degree view of your manufacturing business performance in a single platform, from performance targets to the sales forecast. Now, AI-powered insights help you easily analyze and view your organization's top-down target attainment across customers, products, and regions based on product volume and revenue.

Available with purchase of Manufacturing Cloud Einstein Analytics (EA for MFG)
Account-Based Forecasting Enhancements

Ensure even more forecast accuracy with added flexibility and control over the Account-Based Forecast. Define which Sales Agreements are included in your organization's Account-Based Forecasting calculation. Plus, use opportunity probability metrics to weight your forecast.

Learn More

Available with purchase of Manufacturing Cloud
Industries - Consumer Goods Cloud

- Einstein for Consumer Goods
- Direct Store Delivery
- Visit Execution Enhancements
Weave intelligence into the route to market to streamline everything from visit planning to execution. Analyze your business and discover insights to understand areas of growth and opportunity with Einstein Analytics for Consumer Goods. Ensure audit accuracy and productivity during store visits with Einstein Vision for Consumer Goods. And visit the right stores at the right time with Einstein Visit Recommendations.

Learn More  Watch Demo
Prioritize orders for delivery based on performance of stores and assign tasks to drivers; provide drivers visibility into order information and fulfill stock with inventory on-hand.
Provide more flexibility to users to create custom tasks; empower field rep productivity by enabling visit views for past and future visits, allowing field reps to review visits sorted, filtered by various criteria such as planned start time, priority, and status.

Learn More

Available with purchase of Consumer Goods Cloud
Industries - Sustainability Cloud

- Data Gap Filling
- Scope 3 Estimation Module
When organizations upload the energy used by their buildings, data gaps and overlaps will affect their carbon emissions analysis. This module helps users find and fix those gaps and overlaps.
The Scope 3 EEIO (Environmental Economic Input-Output) module helps organizations estimate their scope 3 carbon emissions for five of the 15 scope 3 categories. It matches organization procurement data against an EEIO database to map carbon emissions as a function of spending for hundreds of procurement categories.
Salesforce.org - Nonprofit Cloud

- Salesforce.org Elevate
- Grants Management
- Case Management: Client Intake
- Case Management: Client Referrals
- Accounting Subledger Enhancements
- Tableau Dashboards for Nonprofits
Salesforce.org Elevate

A range of new digital fundraising capabilities help nonprofits exceed their goals. Giving Pages enables teams to create out-of-the-box donation forms connected to their payment provider, and Payment Services seamlessly integrates the gift data from these online payments into Salesforce via Nonprofit Success Pack (NPSP).

Learn More  Watch Demo

Customer must have NPSP and buy Elevate
Grants Management

A flexible, community-driven grantmaking solution that is built off of the world’s #1 CRM and evolves with you as your funding of programs grows.

Learn More  Watch Demo

Available with purchase of Community Cloud
Intake is the process by which a candidate seeking support becomes enrolled in a program and begins receiving services. It's the start of their journey with an organization. With Client Intake, case managers can reduce the time and steps needed to enroll a client into a program and start delivering services in a time when the demand for services is higher than ever.
Referrals are when a service provider or a case manager identifies a need that cannot be met by the program their currently enrolled in and directs that client to another program or organization that can fulfill that need. With Client Referrals, case managers can create an outbound referral to another program or organization and understand where inbound referrals are coming from and for which services.
Help fundraising and finance teams stage, open and close periods of time when accounting information can be created.

Available with purchase of Nonprofit Success Pack
Tableau Dashboards for Nonprofits

Help fundraisers visualize success with pre-built Tableau dashboards.

Available with purchase of Nonprofit Success Pack
Salesforce.org - Education Cloud

- Salesforce.org Elevate
A range of new fundraising capabilities help advancement teams exceed their goals. Giving Pages enables teams to create out-of-the-box donation forms connected to their payment provider, and Payment Services seamlessly integrates the gift data from these online payments into Salesforce via Gift Entry Manager (GEM) or Nonprofit Success Pack (NPSP).
Salesforce.org - Philanthropy Cloud

- Philanthropy Cloud for Android
- Disbursement Services Enhancements
Philanthropy Cloud already exists as an app for iOS, and now it's available for Android, too. Philanthropy Cloud for Android provides all the functionality found in the browser-based version, including donating funds, signing up for volunteer opportunities, and managing their accounts.

Learn More  Watch Demo
Disbursement Services Enhancements

Philanthropy Cloud is now integrated with FrontStream, a donation processor and disbursement service. With FrontStream, companies have more control and flexibility for disbursement, and employees have more charities to choose from and added visibility into their donations.

They need their company to have purchased licenses for Philanthropy Cloud.
Success Cloud

- Help Portal Enhancements
- 26 new and refreshed Accelerators
- Datorama Jump Start enhancements

'21
Help Portal Enhancements

Get answers faster than ever with our shorter case submission process (just 4 fields!), technical support for Quip, Chat support queuing for Premier customers, and Chat Support for Pardot Premier customers.

Learn More  Watch Demo
New and updated 1-on-1 coaching sessions with Salesforce Specialists, including Accelerators for Work.com, Salesforce Maps, and Service Cloud Voice.
Get up and running with Datorama email and advertising within weeks! With our new Jump Start programs, our Salesforce implementation experts will set up your environment with key business processes, productivity features, and tailored fields to make sure you see value from Salesforce as fast as possible.

Available with purchase of Datorama
Integration (MuleSoft)

- Anypoint Exchange: API Groups
- Anypoint Design Center: API Design Collaboration
- MuleSoft Connector for Salesforce Enhancements
MuleSoft now allows users to package multiple APIs as a product by controlling the search, management, and governance of APIs in user-defined groups.

Available with purchase of MuleSoft Anypoint Platform
MuleSoft's API Designer now allows users to comment and @ mention others by highlighting part of API specifications.
MuleSoft's connector for Salesforce will get new capabilities to enable faster and easier data integration between SFDC and other systems, including Bulk Merge and Streaming Events.

Learn More