



YES CRM Consultants

Salesforce Summer 17 Release Features



Agenda

- Enabled for All Users by Default
- Requires Administrator Setup
- Enabled for Admins by Default
- Salesforce support to be contacted



ENABLED FOR USERS



Sales



Core Sales Features : Accounts

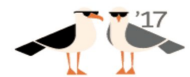
Available in: Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Change applies : Lightning Experience only.

Features Available :

- See Account Hierarchy Details on the Same Page
- Add Account Team Members with Accuracy

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Core Sales Features : Campaigns

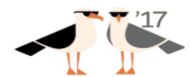
Available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Change applies : Lightning Experience and all versions of the Salesforce1 mobile app.

Features Available :

- Add Members to Campaigns from Accounts

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Core Sales Features : Opportunities

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

Change applies : Lightning Experience only.

Features Available :

- See Opportunity Stage History in Lightning Experience
- Jump to Today's Date with One Click

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Core Sales Features : Path

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

Change applies : Lightning Experience only.

Features Available :

- Build Success with Path on Contracts and Orders

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Core Sales Features : Contacts

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

Change applies : Lightning Experience and all versions of the Salesforce1 mobile app.

Feature Available :

- Create Contacts Quicker from Account Records



[Click here for the document](#)

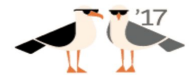
Productivity Features: Email

Available in: Group, Professional, Enterprise, Performance, Unlimited.

Change applies : Lightning Experience only.

Feature Available :

- Use Your Classic Email Templates in Lightning Experience
- See and Do More with the Pop-Out Email Composer



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Productivity Features: Activities

Available in: All Editions.

Change applies : Lightning Experience only.

Feature Available :

- Stay on Top of Things with the Updated Activity Timeline

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Productivity Features: List Views

Available in: All Editions.

Change applies : Lightning Experience and all versions of the Salesforce1 mobile app.

Feature Available :

- Delete Charts from List Views

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Productivity Features: Kanban Views

Available in: All Editions.

Change applies : Lightning Experience only.

Feature Available :

- Summarize by Numeric Fields
- Group the Kanban View by Owner
- Identify Cards That Reps Can't Update

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Productivity Features: Notes

Available in: All Editions.

Change applies : Lightning Experience only.

Feature Available :

- Share Notes and Add Them to Records with Ease

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Productivity Features: Home

Available in: All Editions.

Change applies : Lightning Experience only.

Feature Available :

- See Assistant Updates in a New Way

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Files

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

Change applies to : Lightning Experience.

Features Available :

- Consciously Uncoupling: Libraries and Content(Salesforce Classic)
- Updates to Libraries
- Share Public Links to Your Files
- Unshare a File
- Right-Click to Open a File in a New Tab

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Chatters

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

Change applies : Lightning Experience only

Features Available :

- Use Topics to Organize Your Content in Chatter

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Feeds

Change applies : Lightning Experience only

Features Available :

- There Are Lots of Shiny New Features for Streams
- Use a Record's Follow Action to Add It to a Stream
- Get a Richer Experience with the New Editor in Chatter
- Company Highlights Is the Default Feed for New Users

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Feeds Contd...

Change applies : Lightning Experience only

Features Available :

- Filter Groups to Show Unread Posts
- Filter a Profile to See a User's Posts
- The What I Follow Feed Gets Some New Filters
- Is Your Post Reaching the Right People?
- Share a Post with a Group in Lightning Experience

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Customization

Change applies : Lightning Experience and all versions of the Salesforce1 mobile app.

Features Available :

- Rich Text Editors for Custom Fields Get a New Look
- Reassign Approval Requests
- Recall Submitted Approval Requests
- View Approval Comments

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Salesforce Overall

Change applies : Lightning Experience only.

Features Available :

- Ditch Your Mouse—Keyboard Shortcuts Are Here
- Boost Productivity with Keyboard Shortcuts for Lightning Console Apps
- Navigate to a Record Directly from an Action Success Message
- Preview Case Details with Case Hovers
- Spell Correction Is Applied to Your Term

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Analytics



Change applies : Lightning Experience only.

Features Available :

- Add Dashboard Filters in Lightning Experience
- Find Reports More Easily While Adding or Editing Dashboard Components
- Subscribe Other People to Reports
- Create Report and Dashboard Folders in Lightning Experience
- Other Enhancements to Reports and Dashboards in Lightning Experience

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Service



Change applies : Lightning Experience only.

Features Available :

- Filter Your Case Feed in Lightning Experience
- See Email Attachments in the Case's Attachment Related List
- The Send Email Quick Action Is Renamed Email
- One-Stop Shop for Lightning Knowledge Setup
- Send Snazzier Emails with a Better Rich-Text Toolbar

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Mobile

Available in: All versions of Mobile app

Change applies : Salesforce1 mobile browser app.

Features Available :

- Get More Information About Records Before You Tap
- Create Contacts Quicker from Account Records
- Tag Posts and Comments with Topics

[Click here for the document](#)



ENABLED FOR ADMINISTRATORS/ DEVELOPERS



Salesforce Overall

Available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions. These features are available in late May 2017.

Change applies: For all the versions.

Features available: Optimizer now analyzes several new items across your implementation, please check below document for details.

- Add-on to Optimizer
- Keep Your Code Current with Optimizer
- Get Better Assistance with the Restyled Lightning Experience Migration Assistant .
- Switch More Users to Lightning Experience
- Make Lightning Experience the Only Experience

[Click here for the document](#)



Salesforce Overall Contd...

Features available: Optimizer now analyzes several new items across your implementation, please check below document for details.

- Get Search Results for More Objects
- Choose Utility Icons for Your Lightning Apps More Easily
- Enjoy a Spiffier Look and Feel in Lightning Experience

[Click here for the document](#)



Sales



Lightning Experience Resources



Features available:

- Feel Confident About Your Lightning Experience Readiness
- Optimize Sales Features for Lightning Experience

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Other Changes in the Sales Cloud

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

Features available:

- Make It Easier to Create Orders
- Determine Which Order and Order Products fields Appear
- Duplicate Management Setup Items Consolidated
- Ineffective Matching Rules Can't Be Activated

[Click here for the document](#)



Emails



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

Change applies: Salesforce Classic Only.

Features available: Update existing Letterhead email templates

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Field Service

Available in : Enterprise, Performance, Unlimited, and Developer Editions. Work orders are also available in Professional Edition.

Change applies: Lightning Experience and Salesforce Classic.

Features available:

- Resource Absences Can Now Overlap
- Do More with Field Service in the Process Builder

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Social Customer Service

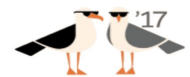
Available in : API enabled Professional editions, Enterprise, Performance, and Unlimited editions.

Change applies: Lightning Experience only

Features available:

- Do All Your Socializing in Lightning Experience

[Click here for the document](#)



Chatters



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

Change applies: Lightning Experience and Salesforce Classic

Features available:

- See Who's Most Active in Chatter with the Top Users Report

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Files

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

Change applies: Lightning Experience only

Features available:

- Customize the Files Detail Page

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Service Cloud

Available in : Performance and Developer Editions and in Unlimited Edition with the Service Cloud.

Professional, Enterprise, and Unlimited Editions with additional cost

Change applies: Lightning Experience only.

Features available:

- A Record Home of Your Own—Configure Lightning Knowledge Record Home
- See Where Your Service Cloud Features Stand with Lightning Experience

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Mobile

Available in : Salesforce1

Features available:

- Salesforce Mobile Classic

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Customization

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

Change applies: Lightning Experience only.

Features available:

- Power Up Your Lightning Pages with the Flow Component
- Open More Tabs from Setup with Right-Click
- Find Your Way to Object Manager More Quickly
- Efficiency Features at Your Fingertips in Setup

[Click here for the document](#)



Customization

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

Change applies: Lightning Experience only.

Features available:

- Show Custom Apps in Lightning Experience
- Disable Lookup Record Preview in Lightning Experience for Accessibility
- Launch Flows in Lightning Runtime from Buttons, Links, and Custom Tabs

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Customization Contd...

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

Change applies: Salesforce Classic and Lightning Experience

Features available:

- Delegated Admins: View and Assign Public Groups with More Ease
- Redirect Flows That Render in Lightning Runtime
- Get Extended Error Details for Flows in the Tooling API
- Session-Based Permission Sets Are Generally Available
- Activate or Deactivate a Session-Based Permission Set Using a Flow

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Security and Identity

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

Change applies: Salesforce Classic and Lightning Experience.

Features available:

- Embedded Login Enables Users to Log In to Your Website
- Export Profile Password Policies
- Import a Custom Security Baseline into Health Check
- Health Check Has New and Changed Security Settings

[Click here for the document](#)



Deployment

Available in : Enterprise, Performance, Unlimited, and Database.com Editions

Change applies: Lightning Experience and Salesforce Classic.

Features available:

- New Change Set Components
- Modify All Data Permission Is Automatically Selected When You Select Deploy Change Sets

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REQUIRES ADMINISTRATOR SETUP



Salesforce Overall

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

Usage: Track and display the field history for standard or custom objects, regardless of which Salesforce interface you're using.

Change applies: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

Features available:

- Access Field History Related Lists in Lightning Experience

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Sales



Core Salesforce Features: Leads

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

Change applies : Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

Features Available :

- Keep Related Files and Records When Reps Convert Leads
- Relate Accounts to Leads Faster with Account Matching
- Use the API to Relate an Existing Opportunity During Lead Conversion

[Click here for the document](#)



Core Salesforce Features: Campaigns

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

Change applies : Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

Features Available :

- See Which Campaigns Accounts Are Responding To.
- Add Members to Campaigns from Reports in Lightning Experience

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Core Salesforce Features: Path

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

Change applies : Lightning Experience.

Features Available :

- Decide how Path displays

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Core Salesforce Features: Notes

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

Change applies : Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

Features Available :

- Convert Old Notes to Lightning Experience with the Salesforce API

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Core Salesforce Features: Contacts

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

Change applies : Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app.

Features Available :

- Show Who Reports to Whom from Contact Pages in Lightning Experience

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Data Quality

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

Change applies : Lightning Experience.

Features Available :

- Detect Duplicates Across Contacts and Leads Using Standard Rules
- Surface Duplicates Across Objects in Lightning Experience
- Get a Free Assessment Before Investing in Data Packages

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Service



Supercharge Your Productivity in the Lightning Service Console App

Available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions with Service Cloud

Change applies : Lightning Experience only.

Feature Available :

- Keep Everything at Hand with Lightning Console Split View.
- Less Is More—the Compact Case Feed
- Drag Files onto Files and Attachments Related Lists
- Preview Case Details with Case Hovers

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Cases

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

Change applies : Lightning Experience and all versions of the Salesforce1 mobile app.

Features Available :

- View, Create, Edit, and Delete Case Comments

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Field Service

Available in: Enterprise, Performance, Unlimited, and Developer Editions.

Change applies : Salesforce Classic and Lightning Experience.

Features Available :

- Get the Right Tool to the Job with Parts Requests and Stock Transfers
- Manage Your Mobile Workforce with Time Sheets.

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Chatters

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

Change applies : Salesforce Classic and Lightning Experience.

Features Available :

- Create a Report on the Top 100 Feed Item Views

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Files

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

Change applies : Lightning Experience.

Features Available :

- Validation Rules Improve File Data
- Convert Attachments to Files

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Customization: Custom Field and Picklist Administration

Available in: All Editions

Change applies : Lightning Experience.

Features Available :

- Promote Your Picklist Fields to Global Value Sets
- Global Value Sets Get Higher Limits

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CONTACT SALESFORCE TO ENABLE



Security and Identity

Change applies: Lightning Experience and Salesforce Classic.

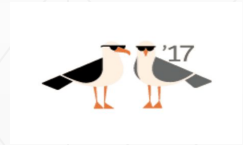
Features available:

- Get More Control over Connected App Access
- Bookmark Redirection Is Supported Even When Chatter Is Disabled

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Development



Apex : Send and Manage Orders with Apex

Features available:

If you're a Salesforce partner, use the new Channel Order Apex API to automate order submission and management. After you send orders to Salesforce, you can edit, recall, or clone them using methods in the provided Apex classes. The Channel Order Apex API replaces the legacy Partner Order Submit API.

Note: This feature is available to eligible Salesforce partners. For more information on the Partner Program, including eligibility requirements, visit www.salesforce.com/partners.

[Click here for the document](#)



ISVforce

Available in : Enterprise, Performance, and Unlimited Editions

Change applies: Lightning Experience and Salesforce Classic.

Features available:

- Send and Manage Orders in Lightning Experience
- Automate Order Processing with the Channel Order Apex API
- Exclude Subscriber Orgs from a Push Upgrade
- Improved Performance for Managed Package Push Upgrades
- Improved Performance for Managed Package Push Upgrades
- Metadata Access in Apex

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Thank you

