



YES CRM Consultants

Salesforce Winter'17 Release Features

Agenda



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



Supported Browsers



➤ **Lightning Experience**

- Microsoft Edge
- Microsoft IE version 11
- Mozilla Firefox
- Google Chrome
- Apple Safari version 8.x and 9.x

➤ **Salesforce Classic**

- Microsoft Edge
- Microsoft IE version 9,10 and 11
- Mozilla Firefox
- Google Chrome
- Apple Safari version 8.x



Enabled for Users



General Administration



- Create More Spanning Relationships Per Object in Formulas**
- Improvements for Functions**

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Sales Cloud



- Identify and Merge Duplicate Leads in Lightning Experience
- Optimize Clicks and Time by Editing Inline (Beta)
- Quickly Add Multiple Members to a Campaign
- Name Fields in Rows Visible in Custom Report Types
- Opportunities: Probability Field Editable in Lightning Experience
- Stay-in-Touch Requests Is Retiring in Summer '17

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Chatter



- ❑ **Email on Announcement Graduates to Generally Available**
- ❑ **Chatter Answers Retires in Winter '18**

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Security and Identity feature for Salesforce Classic and Lightning Experience

- ❑ **Back Up and Restore Your Connected Accounts in Salesforce Authenticator**
- ❑ **Copy Codes and View Timer with Ease in Salesforce Authenticator**
- ❑ **Let Users Connect Multiple Authentication Apps**

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Salesforce1 Features



- Updated Salesforce1 Requirements
- Send Text Messages from Salesforce1
- Change Record Types in Salesforce1

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Salesforce1 Features Contd....



- Feed Item in Salesforce1 Navigation Menu Now Called Chatter**
- Turn Down the Noise in Chatter Feeds from Salesforce1**
- Grow Group Membership in Salesforce1**
- Add Products to Opportunities in Salesforce1**
- View Scatter Charts (and Better Table and Gauge Charts) in Salesforce1**

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Requires Administrator Setup



Salesforce Overall



- ❑ **Ready, Set, Relaunch: A New Look for the App Launcher**

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Sales Cloud



- ❑ **Relating a Contact to Multiple Accounts Gets Even Better**
- ❑ **Cloud Scheduler is Being Retired**
- ❑ **Sync Appointments from Google Calendar™ to Salesforce**

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Customization



- Replace Values from Global Picklists**
- Convert a Shared Picklist's Field Type from the User Interface**
- Make an Existing Custom Picklist Required**
- Manage Inactive Values in Unrestricted Custom Picklists**

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Analytics

- Broaden Your Horizons—Include External Data in Reports**

Files

- Add and Remove Files When Editing Posts in Lightning Experience**

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Security and Identity



- ❑ **Log In Password-Free with Lightning Login**

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Chatter



Edit Feed Posts and Comments in More Places

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Enabled for Admins by default



Salesforce Overall:

- ❑ **Create Custom Apps in Lightning Experience and navigate more efficiently**
- ❑ **Get Field level help in Lightning Experience**

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Sales:

- When your data assessment is complete, you get an email.**
- Daily org limits for sending API have increased.**
- Filter activity Timeline**
- Personalize Calendars with different colours**
- See Monthly view of your Calendar events.**

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Customization:

- Embed Your Flows in Lightning Pages (Beta)**
- Build Reusable Processes**



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Security and Identity:



- Remote Site settings require “View setup and Configuration” permission
- Instantly fix your security Risks using Health Check
- Audit your certificate and key management settings in Health Check
- Access to security health check limited by User permission

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Deployment

- New Change set component**
- Get more days to schedule your Quick deployments**
- Deploy Apex Test suites to other orgs**

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Contact Salesforce to Enable



Contact Salesforce to Enable

- Update Org-Wide Defaults with Asynchronous Parallel Recalculation (Pilot)**
- Access Encrypted Data in Process Builder (Pilot)**
- Access Encrypted Data in Your Flows (Pilot)**

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Thank you!