

Syracuse Trailblazers

Feb 16
2021



Connecting



Trailblazer Community Groups: Syracuse, NY Developers Group

- How we track membership, schedule meetings and RSVP to upcoming events

Twitter: @syracusedevs

- Posting formal meetups, informal gatherings, retweeting regional events and member activities

Chatter: Syracuse, NY Developers Group

- Conversations and discussions with other group members

Web: SyracuseDevelopers.com

- Links to the above sites, copies of slides/code presented at meetups



Spring 21



Trailblazer
COMMUNITY GROUPS

This presentation has not been created by Salesforce, Inc but is based on forward looking statements.

Statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.



Spring 21



Trailblazer
COMMUNITY GROUPS



Rebranding

Retirement

Upcoming Changes

Help

In-App Guidance

Lightning

Reports

Flows

Code

Release Plan



Spring 21



Trailblazer
COMMUNITY GROUPS

Release Notes

- https://help.salesforce.com/articleView?id=release-notes.salesforce_release_notes.htm&type=5&release=230

Trailhead

- <https://trailhead.salesforce.com/en/content/learn/modules/spring-21-release-highlights>



Rebranding



Trailblazer
COMMUNITY GROUPS

Community Cloud -> Experience Cloud

Community -> Site or Experience Cloud site

Lightning Community -> Experience Builder

Lightning Dialer -> Sales Dialer

Lightning Flow -> Salesforce Flow

Lightning Flow Builder -> Flow Builder

Lightning Process Builder -> Process Builder

https://help.salesforce.com/articleView?id=release-notes.rn_experiences_rebrand.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_sales_dialer_head.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_salesforce.htm&type=5&release=230



Retirements



Trailblazer
COMMUNITY GROUPS

IE 11

Permanent 'Unsupported' banner

Users are not blocked from accessing, but support doesn't care if it doesn't work

Read Only Profile

New orgs will no longer have the standard Read Only profile

Clone the Minimal Access profile instead

HTTP

All sites and custom domains will require HTTPS by July 2021

https://help.salesforce.com/articleView?id=release-notes.rn_supported_browsers_ie11.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_profiles_and_perms_read_only_new.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_security_domain_enable_https.htm&type=5&release=230



Retirements



Trailblazer
COMMUNITY GROUPS

Ant Needs Java 11

Spring 21 Ant Migration Tool requires Java 11

Earlier Ant tools still support Java 7

Aura ui Namespace

Support ends May 1, 2021

They continue to work, but support doesn't care if it doesn't work

ui:button, ui:inputNumber, ui:outputText, etc

Use lightning namespace (like lightning:button)

https://help.salesforce.com/articleView?id=release-notes.rn_deployment_ant_migration_java_11.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_aura_ui_deprecate.htm&type=5&release=230



Upcoming Changes



Trailblazer
COMMUNITY GROUPS

Dynamic Actions (Demo - Accounts page, eVerify button)

GA for Desktop for Accounts, Case, Contact, Lead, Opps

All other standard objects are still in beta on Desktop

Multi Factor Authentication Required (free)

MFA will be required Feb 1, 2022

Required for all logins to Salesforce through the UI

Not required for SAML or OpenID based SSO logins

Will be required for Sandboxes

https://help.salesforce.com/articleView?id=release-notes.rn_lex_dynamic_actions_desktop_mobile.htm&type=5&release=230
https://help.salesforce.com/articleView?id=000356005&language=en_US&mode=1&type=1



Help

Release Notes in Help

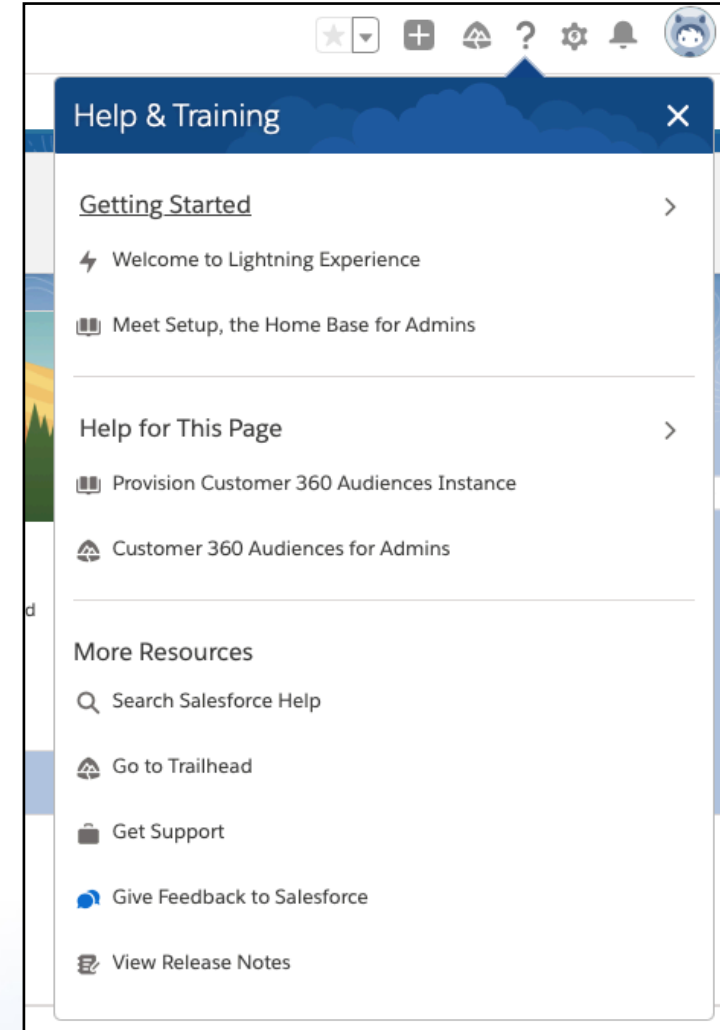
- Access the release notes from the Help menu

Info Icon Text Increase

- Help hover text for fields increased from 255 to 510 chars

In-App Learning (Demo, Beta)

- Assign Trailhead modules to some or all users
- Assign to show up for specific objects
- Ex: Spring 21 highlights and campaign basics modules



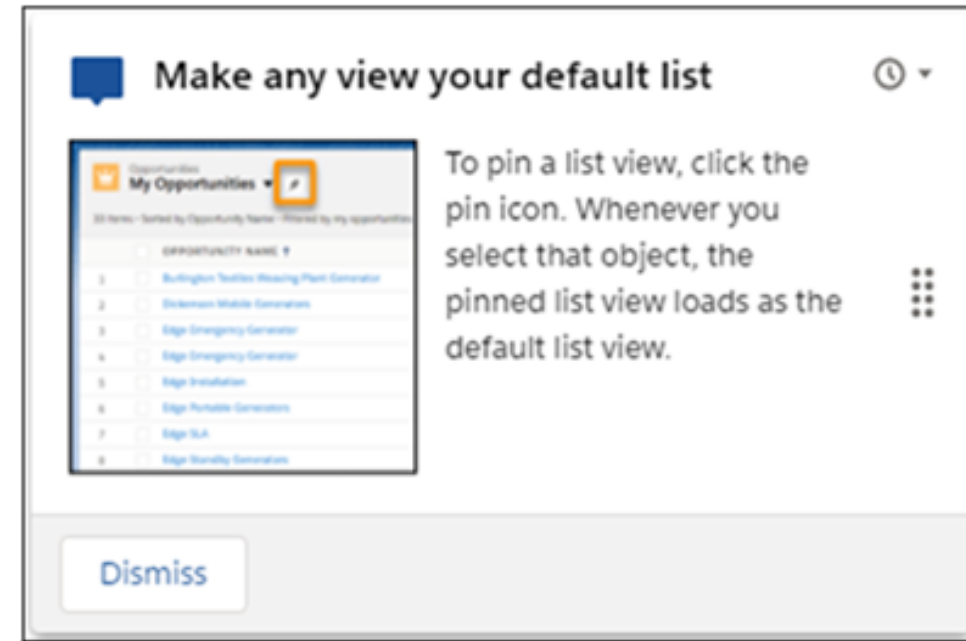
In-App Guidance

Snooze

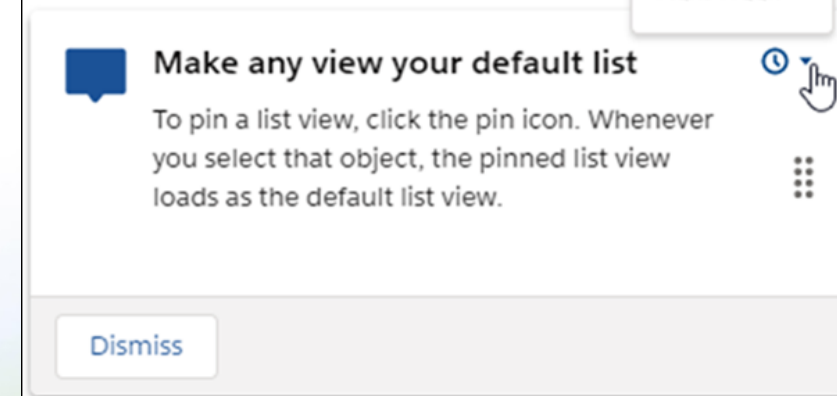
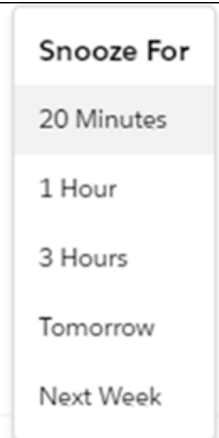
- User can snooze an in-app guidance until later

In-App Images

- Add jpg, png or animated GIFs to In-App prompts



Trailblazer
COMMUNITY GROUPS



https://help.salesforce.com/articleView?id=release-notes.rn_general_iag_snooze.htm&type=5&release=230

https://help.salesforce.com/articleView?id=release-notes.rn_general_iag_upload_image.htm&type=5&release=230



Lightning



Trailblazer
COMMUNITY GROUPS

Custom Actions on Recently Viewed list view

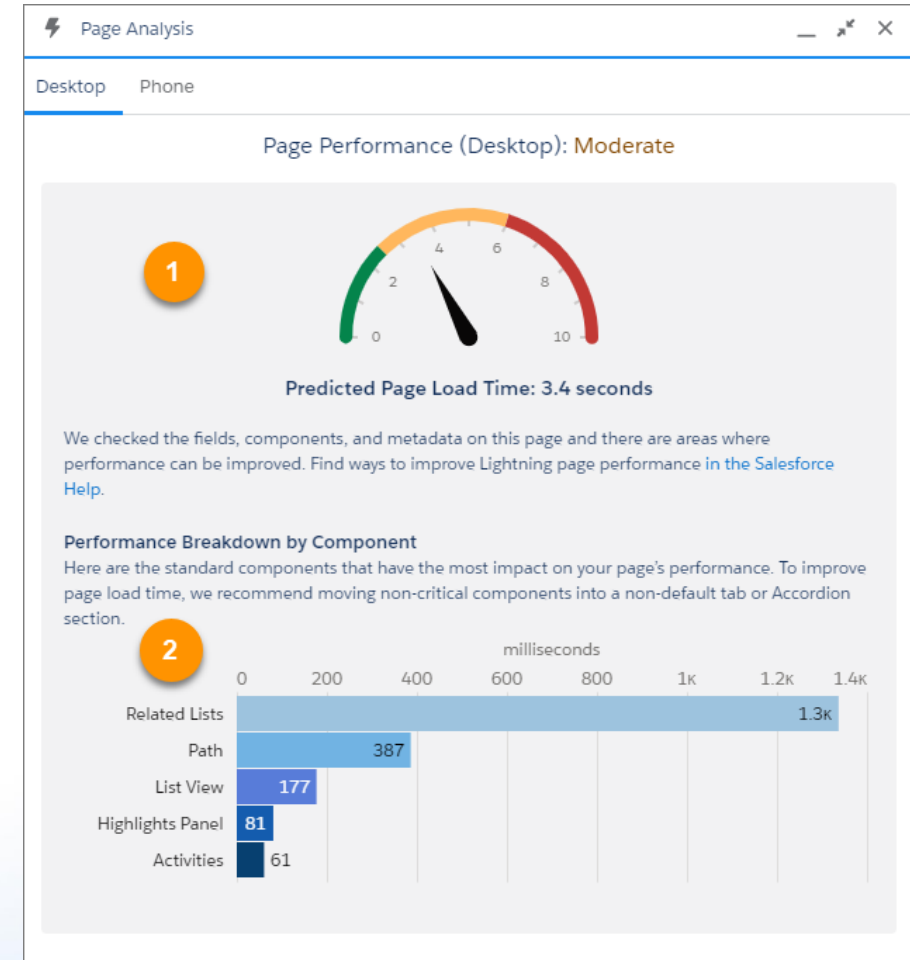
- List view actions and buttons can now be placed on the Recently Viewed list views

Accounts as Campaign Members (Demo, Beta)

- Add an account to a campaign
- Expands campaign membership from just leads and contacts

More Details in Page Performance

- Better info on page load times and possible slowdowns



https://help.salesforce.com/articleView?id=release-notes.rn_lex_mru_list_actions.htm&type=5&release=230

https://help.salesforce.com/articleView?id=release-notes.rn_sales_account_campaign_members.htm&type=5&release=230

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_lab_perf_analysis_enhancements_desktop.htm&type=5&release=230



Lightning

Manual Sharing in Lightning (Demo - Leads)

- Finally, you don't need that Salesforce Labs app
- Available for accounts, opportunities, cases, contacts, leads, and custom objects
- Not available in mobile app

Customize no-reply email for cases

- Previously, select case emails came from noreply@salesforce.com
- Set your own From: address on select case notifications
- Case Comment, Case Escalation, Case Assignment, and when an existing case receives emails

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_manual_sharing_lex.htm&type=5&release=230

https://help.salesforce.com/articleView?id=release-notes.rn_service_case_management_noreply.htm&type=5&release=230



Lightning

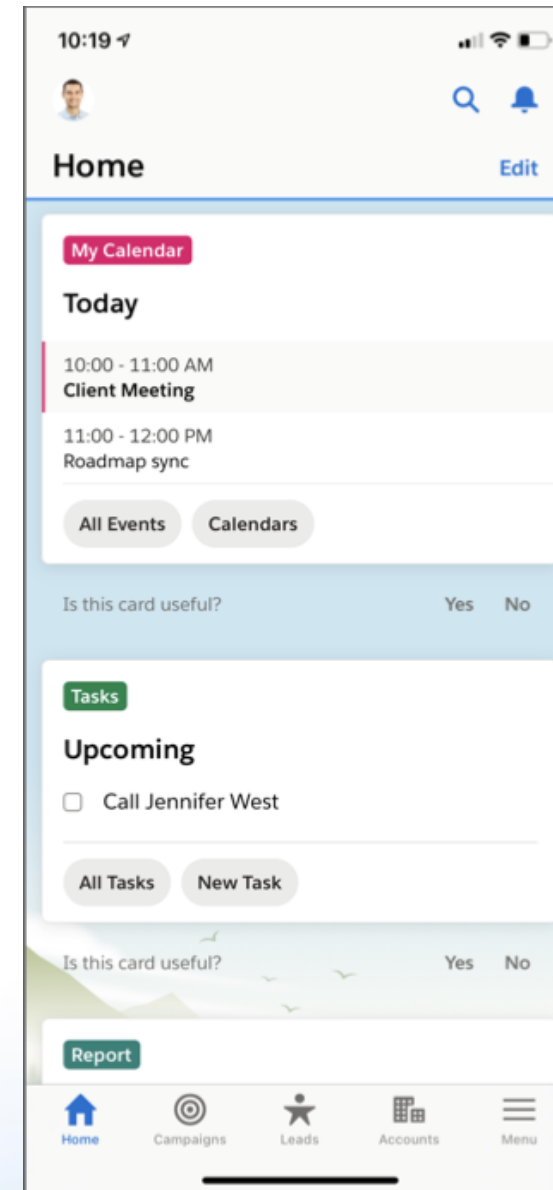
Dialog Boxes in Console apps (Demo)

- Dialog boxes stay with the tab, instead of the entire screen
- Lets you switch tabs while a box is open
- Testable now, auto enabled in Winter 22 release.

Mobile Home (Beta)

- New landing page for the mobile app
- Displays cards based on user's behavior in the app
- User can customize, add and remove cards

https://help.salesforce.com/articleView?id=release-notes.rn_console_dialogs.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_mobile_home.htm&type=5&release=230



Trailblazer
COMMUNITY GROUPS

Reports

Multi select fields (Demo)

- Drag multiple fields at once into a report
- Use the collapsible Fields list on the left

Export as .xlsx (Demo)

- Reports can be exported in .xls, .xlsx or .csv formats
- Can remove option for .xls reports

Dashboard Filters (Demo)

- Just like report URL filters
- Add &fv0=Closed%20Won to end of URL

https://help.salesforce.com/articleView?id=release-notes.rn_rd_reports_multifield_select.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_rd_reports_details_email.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_rd_dashboards_filter_url.htm&type=5&release=230



Flows

Multi Column (Beta)

- Screen flows can have more than 1 column

Lightning Email Templates

- Lightning Email Templates now supported in email alerts, flows, workflows, process builder, approval processes
- Previously only classic templates were supported

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_fbuidler_multicolumn_screens.htm&type=5&release=230

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_email_templates_alerts_lightning_templates.htm&type=5&release=230



Flows

Revisit Control

- More control over what to do when a user revisits a screen

← Toggle

value

Enter value or search resources...

> Set Component Visibility

✓ Advanced

☐ Manually assign variables

Revisited Screen Values

Control what happens to this component's values if the user goes back to the previous screen and forward again to this screen.

☒ Use values from when the user last visited this screen

☐ Refresh inputs to incorporate changes elsewhere in the flow



Trailblazer
COMMUNITY GROUPS

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_fbuilder_multicolumn_screens.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_fbuilder_prior_values_flow.htm&type=5&release=230



Flows

Prior Value

- Access the prior value of a record in a flow
- This was previously only possible with Process Builder
- Available in Before or After flows
- Only when you select “A record is updated” or “A record is created or updated” triggers
- One less reason to use Process Builder

https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_fbuilder_prior_values_flow.htm&type=5&release=230



Trailblazer
COMMUNITY GROUPS

New Resource

* Resource Type
Formula

* API Name
Percent_Amount_Change

Description

* Data Type
Number

Decimal Places
2

* Formula
Insert a resource...
$$\frac{({!$Record.Amount}) - (!$Record_Prior.Amount)}{(!$Record_Prior.Amount)}$$

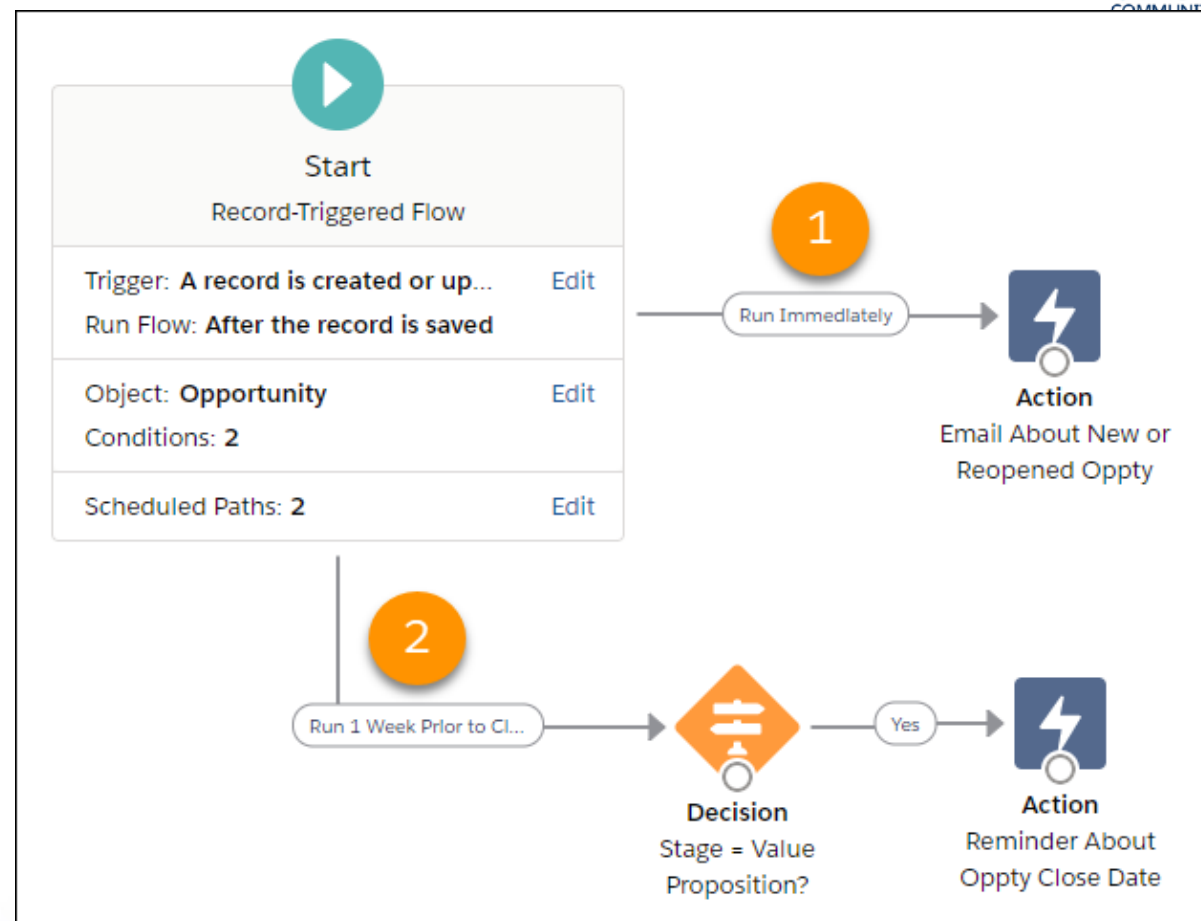
Cancel Done



Flows

Scheduled Path

- Similar to Scheduled Actions in Process Builder
- Similar to Time Dependent actions in Workflows
- Support multiple time actions
- Scheduled parts run in System context as the triggering user
- Can be used in Create or Update (with entry condition) After flows
- One less reason to use Process Builder



https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_flow_fbuiider_scheduled_paths.htm&type=5&release=230



Code



Trailblazer
COMMUNITY GROUPS

Sandbox Source Tracking

- Know how you can auto track and pull the metadata changes from scratch orgs?
- You can do that with regular sandboxes now
- Compares local sfdx project to sandbox

Apex Static Methods for getting Custom Metadata Records

- No longer need to do SOQL to get a CMT record
- `getAll()`, `getInstance(id)`, `getInstance(ApiName)`, `getInstance(DevName)`
- `List<MyCMT__mdt> md = MyCMT__mdt.getAll().values();`

https://help.salesforce.com/articleView?id=release-notes.rn_sandboxes_source_tracking.htm&type=5&release=230
https://help.salesforce.com/articleView?id=release-notes.rn_forcecom_dev_static_accessor.htm&type=5&release=230



Code



Trailblazer
COMMUNITY GROUPS

SOQL FIELDS() functions (Demo)

- Get predefined groups of fields without needing to specify every one individually
- Similar to SQL's Select *, but respects FLS
- Don't need to know the names of the fields in your query string
- Avoids query character limit for very large queries
- Get all fields, standard fields or just custom fields
- Must limit queries to a max of 200 records (required)
- `SELECT FIELDS(ALL) FROM Account LIMIT 200`

https://help.salesforce.com/articleView?id=release-notes.rn_api_soql.htm&type=5&release=230



Thank You For Coming!



Ottawa User Group

February 17 at 12pm

<https://trailblazercommunitygroups.com/e/mmfbwn/>

London's Calling

March 19

<https://www.londonscalling.net>

