Spring '20 Abridged

The Salesforce Discord Collective Presents:

THE SPRING 20 RELEASE NOTES - ABRIDGED

Bug Fixes & Various Impro… wait this isn't the app changelog.

CRITICAL STUFF

- Lex is getting activated for all orgs on January 7, 2020. No, this does not mean all users will be forced to use LEX. Yes, this means you need to study impact. No, it shouldn't be high impact unless you follow no best practices whatsoever, which we've already covered a few times.
- New Mobile App incoming for all in Spring 20 so read up on how to personalize it and fast. Also SF nuking their mobile browser version so better learn to love that new app.
- SameSite Cookie Changes may require action to prevent integrations failing
- Muting Permission Sets now live within Permission Set Groups which are also GA. While this is awesome for some cases, it adds another layer of stuff to audit, and another layer of complexity to permission handling.
- Custom Setting access and Custom Metadata Access now handled via Profiles & Perm Sets by default.

GENERAL STUFF

- In-App Guidance can now be set by profile and CAN BE TRANSLATED. There's few other minor updates but in general these updates make the feature something that could actually be used for user onboarding in bigger orgs now.
- You can now clone Opportunities and Campaigns with related records. This change is wayyyyyyyyy more hype than it sounds like because this actually required a Flow at the least before.
- The App Launcher no longer requires you to gaze upon it in raptuous glee to change apps, and now has a search bar. Small QoL change but one that has high positive impact for users changing apps all the time.
- Allow your users to use the Salesforce new Voice Assistant, powered by admin-defined Skills. "YES EINSTEIN PLEASE LOG NEW OPPORTUNTITY "TOP SECRET CLIENT" FOR $1M - excuse me sir I'm getting off at this stop, horribly busy day isn't it - CALL BACK

TOMORROW TO BE FIRST ON DEAL”

- Data Mask allows securing sandbox data easily. Great for avoiding undue emails.
- Einstein Opportunity Scoring for Everyone but you’ll need 400 closed opportunities in the past 6 months, half of which should be closed won to take advantage of it.
- Tasks can be assigned to Queues in what is a gigantic moment of happiness for most Sales admins. What isn’t written is how it handles Reminders linked to those tasks, testing needed.
- Outlook integration and Lightning Sync change authentication/integration possibilities - check if you’re now eligible. Both are also up for “Worst Title” in the original release notes.

FLOWS, PROCESSES

Stephen King reported crying in a corner as flow team continues to be KILLIN’ IT for the second release in a row.

As an aside we recommend subscribing to the Flow Product Owner’s blog (rss) for insane stuff that may not be ready for full release.

- In one release, we now have Flows that can run in System mode, Triggered Flows that run BEFORE UPDATE and Object-Agnostic Flow Invocable Actions.

Breaking the List format for a second here, because those changes are massive. First, this means Process Builder are less relevant in a lot of cases, as they run after a DML. Here, before stuff touches the database, Flows can run and edit values on the record. This is FAST AS FUCK and plays well with limits. Combined with Scheduled Flows, this means that you can remove quite a few processes that had long-runing paused interviews (replace that PB that says “set contract to expired after end date in the past” with a scheduled Flow that will run daily). In short - if you’re an admin, you know Process Builder, but you don’t know Flows, go to trailhead NOW or ask for training ASAP because your job will depend on it medium-term.

- A formerly hidden feature is now fully documented and easily available - getting fields from Parent objects via formulas after a GET element, without further queries
- Following the Contact Roles becoming more like normal objects last release, you can now trigger Process, Flows and WF Builder off of them.

COMMUNITIES

- Account Hierarchies via Parent Accounts can be used for record sharing (Beta) so you can see child account information if you own a Parent.
- Salesforce CMS can now post to other systems - including heroku, completely custom endpoints, etc. I imagine this means you could technically use Salesforce CMS to federate content from even external sites and allow Marketing to handle it all in Salesforce, but the Help page is decidedly not forthcoming. I would tag this as “keep an eye on it, see what

SF hatches". Probably not fully baked, hence why they're not putting it in the spotlight.

- Report Builder now GA as is Report Viewing. However "You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner." So in short no license requirements change.
- Playground App on iOS and Android to test how communities look like in mobile app

EMAILS

- UTF8 EMAIL ADRESSES FINALLY WOOOOOOOOOOO THANK YOU EMAIL TEAM
- You can send Emails from a list and now they support drafts
- Enhanced Email Relays now active for everyone which makes sending emails that won't bounce that much easier

SERVICE

- Dynamic Knowledge Article Recommendations powered by Einstein
- Bots get way more awesome with conditional messaging and better error handling when asking for information and Whatsapp support. Also bots don't wait as long when your users go out to buy cigarettes and swear they'll come back.
- Bulk Macros in LEX

SMALL RANDOM THINGS THAT ARE NICE

- Advanced Currency Management is now in LEX but still has all of its limitations which makes using it a pain.
- You can filter products when adding them to Opportunities

DEVELOPMENT

- @track no longer required for LWC which will make unupdated code samples and documentation confusing for new comers, but is otherwise a nice change
- Wire Adapters Not Guaranteed to Emit the Same Data and we're all confused as to how exactly the data could be different to be honest.
- Calendars, Communities now available and customizable vi API
- That pre-fill records via URL thing from above is also usable via dev
- Embedded Services for Web (AKA Snapins, AKA LiveAgentButtonsV2) now support LWC embeds
- Communities search parameter changed to :term - legacy parameter :searchString deprecated but supported.

- You get an API Call.YOU GET AN API CALL. EVERYONE GETS API CALLS

CPQ - by Mekel

- Do More with Improved Price Rules in the Configurator – Price Rules just got a small upgrade, price rules utilizing config attribute values will have their updates/pricing changes reflected directly in the Configurator, no more running back and forth to the QLE to see the updates
- Apply Edit Rules Efficiently in the Configurator – YO we got a new Quick Action called Apply Rules that runs ALL (Configurator) Price and Product rules, so you don't have to constantly run your rules with every change.
- Logic Updated for Percent Values in Price Action Formulas – No more madness of worrying about how the value needs to be input or output for percentage fields. This will potentially affect your existing price rules and throw of your calculations, make sure you're covered.
- Transition from Managed Package Licenses to Permission Set Licenses – Salesforce is releasing a tool to help you determine where you are in converting from managed package licenses to permission set licenses. But you still get to do the grunt work of converting them □□

EINSTEIN ANALYTICS - by Supergrape

- Easily find where your data is being used/comes from with Data Catalog.
- Row limit expanded to 10 billion from 1 billion for Analytics Plus licenses.
- A slew of new connectors added to plug in your other CRMs!
- Do you have a gigantic… Opportunity object? Does the Data Flow take so long to run that you can't run it every 15 minutes? Well now you can split your Opportunity (and any other object) into it's own scheduled sync to let your Dataflow run faster! Also upped the limit from 30 dataflows to 100.
- Inheriting security from Salesforce got a little better, still kind of bad though.
- You can now use SOQL to query Salesforce Data directly, no dataset required!
- Built in "Data Blending", come on Salesforce, it's called a join. Everyone knows it's a join, why cause naming confusions. Nice that they're trying to limit the need for SAQL though.
- Record Actions now have the Lightning theme and can trigger a Flow or Lightning Action.
- Native GUI support for modifying the XMD on datasets is getting much better. It's almost as good as the old Heroku tool that already did all of this.
- I've pretty much always worked EA in Prod, looks like they may be supporting that idea now by allowing you to work on a new version of a dashboard then Publish it when it's ready.

Field Service Lightning

- Shifts for FSL (beta) allow you to create flexible working hours which was previously a major headache for any company that didn't have a weekly recurring schedule (read: LIKE EVERY COMPANY)
  - Can be used in conjunction with Operating Hours
  - Basically looks like you can assign people to one-off shifts rather than being forced to implement recurring shifts that can only recur per day-of-the-week.Alternative till now is a ton of temp records and teaching admins how to data load square pegs in a circle hole. Requires more analysis and more than 1 screenshot to see full capability and whether it can fully replace Op Hours, though.
  - comes with a fancy lightning component to see and manage people's assigned shifts.
- Maintenance Plans now post in chatter to let you know before the VP of Operations that the last-minute PB you slipped in at 2am last night caused 3000 work orders to fail on creation
- Field Service Mobile
  - Global actions are now available from TOP LEVEL screens, which is HUGE. IT IS SAD HOW HUGE THIS IS. Right in line with opening up mobile app customization to developers. "YOU'RE WELCOME" - Salesforce, probably
  - As opposed to being a total black box, you can now manually sync your app for offline use on-demand. Great QoL improvement especially for testing.

BLAST FROM THE PAST

- Case Merge now GA and you can hide closed statuses in the picklist in lex now…
- Prefill Record Values on Create from button. Probably linked to this and then they left the API open, in henry's immortal words.

DOGELAND

- Not technically a Release Note but I would like to give a special :doge: award to whomever thought hiding interesting stuff under the "Lightning Scheduler" section with no title was a good idea. Seriously
- :doge:"Yo Mark what language do they speak in Fr…" "ENGLISH" "…ance?" "ENGLISH I TELL YOU" "… and Japan?" "…"
- :doge:yo this new feature we released relies on deprecated shit. Please click our checkbox to say "yeah I wanna use deprecated shit" to continue using our new feature.
- :doge:The LEX converter is now external to SF and looks like a full-fledged app. No idea why the release notes just mention its home page. In the meantime it's a link, outside of your org, that looks like Salesforce, and helps you migrate your org. Maybee next time they can do a mobile app that iframes a screenshot of a Salesforce Org hosted ona heroku app that forwards to a local client or something less confusing IDK.

- :doge:Hey if you want new features on your cloud-only and client-agnostic enterprise-class software you can now install a chome extension because tying people into a browser made by an ad giant and not available on all platforms was obviously the best choice.
- Also up for a Doge Award is the Object Creator heroku tool, which is still completely and hopelessly broken.

This abridged version was graciously written up by the **SF Discord**

We have a nice wiki: https://wiki.sfxd.org/

And a linkedin page: https://www.linkedin.com/company/sfxd/

Join the ~1900 members in the most active chat-based community around Salesforce these parts of the web at http://join.sfxd.org/

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