



Salesforce.com Winter '18  
Release

October 2017

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# SFDC Release Schedule

- **Currently in sandboxes which meet preview criteria**
  - <https://www.salesforce.com/blog/2017/08/salesforce-winter-18-sandbox-preview-instructions.html>
- **How can I tell if my sandbox is on Winter '18?**
  - Log in as an admin and look for the logo on the home page or change the app from Veeva CRM to another app and in the top left hand corner you will see one of the following logos

## Summer '17 (not upgraded)



## Winter '18



- **Production Release**

- Between October 6<sup>th</sup> and October 13<sup>th</sup>, depending on your production server
- Schedule: <https://status.salesforce.com/status>



# Deck Intentions

- **Highlights features of the SFDC Winter '18 Release relevant to Veeva customers**
  - Does NOT include all features of the release! Examples of those NOT included are:
    - Features in PILOT or BETA (for the most part) in this release
    - Features exclusively for Chatter, Files, Service Cloud, Salesforce for Outlook, Sales Console, Data.com, Communities, etc.
    - Features relevant to a customer based on business process or custom code
  - Veeva customers are encouraged to also review the SFDC Release Notes
    - [https://releasenotes.docs.salesforce.com/en-us/winter18/release-notes/salesforce\\_release\\_notes.htm](https://releasenotes.docs.salesforce.com/en-us/winter18/release-notes/salesforce_release_notes.htm)
- **“Interest for Veeva ” indicator on the slides is an estimate for all Veeva Customers and is based on a scale from 1-3, 3 being the highest level of interest**



# Salesforce Overall

Supported Browsers for Salesforce.com Classic

Turn On Multiple Currencies Without Contacting Support

Translation Workbench Enhancements

Manage Inactive Picklist Values Easier with Pagination

Asynchronous Deletion of Obsolete Shares

Share Business Contacts Manually in Orgs That Use Person Accounts

Run More Workflow Time Triggers Per Hour

Block Execution of JavaScript in the HYPERLINK Function To Be Enforced  
(Critical Update)

“Make Sure Records that Are Submitted Behind the Scenes Are Routed to the  
Right Approval Process” Critical Update Postponed

# Supported Browsers for Salesforce.com Classic

Interest for Veeva: 

- **Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11, and Apple® Safari® version 10.x on macOS**
- **The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported**
- **Some special set-up considerations and limitations apply depending on the browser used – review SFDC help for more details!**



# Turn On Multiple Currencies Without Contacting Support

Interest for Veeva: ★★

## ■ What is it?

- It is now possible to enable multiple currencies instantaneously without locking your org or having to contact Veeva Support

## ■ What do I need to consider?

- Turning on multiple currencies introduces permanent changes in your org
- This feature cannot be turned off
- Review the [\*Implications of Enabling Multiple Currencies\*](#) article in SFDC Help before enabling

## ■ How do I enable it?

- From Setup enter Company Information in the Quick Find box then select Company Information and click Edit
- Enable Activate Multiple Currencies and save your changes



# Translation Workbench Enhancements

Interest for Veeva: ★★

## ■ What are the enhancements?

- *Import and Export Translation Files as XLIFF*
  - When you are working with translation files using Translation Workbench you can now choose either XML Localization Interchange File Format (XLIFF) or Salesforce Translation Format (STF) as your preferred file format for translation
- *Translation Workbench Supports Flow*
  - You can now translate labels for most labels in your flows





# Manage Inactive Picklist Values Easier with Pagination

Interest for Veeva: ★★

## ■ What is it?

- Track your inactive picklist values better with pagination, even if you have thousands of them
- Pagination also helps the pages displaying the values load faster

## ■ How do I enable it?

- Pagination occurs automatically when your inactive value list has more than 30 items, with the last modified values at the top of the list

## ■ How do I use it?

- The Go to list option appears at the bottom of the first 30 entries
- Click it to see all your values, page by page, 30 values on each page



# Asynchronous Deletion of Obsolete Shares

Interest for Veeva: 

## ■ What is it?

- Obsolete shares are now removed asynchronously, so you no longer have to wait for the shares to be deleted before continuing with other operations

## ■ What do I need to consider?

- Many sharing operations have an immediate impact on the visibility of records within the system. For example, deleting a group revokes the access granted to that group via sharing rules or manual shares
- Members of the following groups lose access to records immediately and users above these members in the role hierarchy also lose access to the records
  - Public groups / Queues / Roles / Territories



# Asynchronous Deletion of Obsolete Shares

## ■ What do I need to consider? (continued)

- When deleting a group, the shares to the group also become obsolete. Obsolete shares are deleted asynchronously during off-peak hours to minimize your waiting time during this operation
- When deactivating a user, the manual and team shares associated with that user are deleted asynchronously. A user higher in the role hierarchy retains access to the records associated with these shares until the obsolete shares are deleted. If that visibility is a concern, remove any record access granted to the user before you deactivate the account. All other user-related share types are immediately deleted when the user is deactivated

## ■ How do I enable it?

- To enable asynchronous deletion of obsolete shares, submit a ticket to Veeva Support to get SFDC to enable it. This feature is not enabled by default



# Share Business Contacts Manually in Orgs That Use Person Accounts

Interest for Veeva: 

## ■ What is it?

- Orgs that use person accounts are now able to modify the Organization-Wide Sharing Default for Contacts
- This allows for flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts

## ■ What do I need to consider?

- Manually sharing contacts applies only to the business accounts because person accounts do not have contacts
- To share information about a person account, you must share the entire account

## ■ How do I enable it?

- Contact Veeva Support to engage SFDC to enable business contact sharing



# Run More Workflow Time Triggers Per Hour

Interest for Veeva: ★★

- **What is it?**
  - SFDC has increased the limit for workflow time triggers to 1,000 per hour.
- **How do I enable it?**
  - To increase your hourly time trigger limit, submit a ticket to Veeva Support to get SFDC to change it



# Block Execution of JavaScript in the HYPERLINK Function To Be Enforced (Critical Update)

Interest for Veeva: 

## ■ What is it?

- Blocking execution of JavaScript in the HYPERLINK function was a critical update in Summer '17 and will be activated automatically for all orgs on October 30, 2017
- This change was phased in over several releases and it addresses a security vulnerability that arises when you use JavaScript in the URL argument of a HYPERLINK function
- The JavaScript can include cross-site scripting and make the URL execute on behalf of users

## ■ What do I need to consider?

- After the critical update is enforced, you cannot add or execute JavaScript in the URL of a HYPERLINK function. However, you can edit the function to remove the JavaScript from the URL and substitute a URL that does not contain JavaScript



# Block Execution of JavaScript in the HYPERLINK Function To Be Enforced (Critical Update)

## ■ What do I need to consider? (continued)

- Before this critical update is enforced, review the use of JavaScript in HYPERLINK functions in your Salesforce org and migrate to an alternative solution. Workarounds include:
  - Custom button or link to execute onClick JavaScript
  - Custom Visualforce page with an Apex controller to redirect to the correct URL. Take this approach if you can execute client-side conditional logic to redirect the user to where you want. Create an empty Visualforce page and an Apex controller. Pass the required values from the link to the controller. Then execute the logic in the controller method to determine the URL and perform the redirect
- SFDC recommends that you test this update in a Sandbox to check the behavior of the HYPERLINK function in formula fields

## ■ How do I enable it?

- This critical update is enabled for all orgs on the auto-activation date



# “Make Sure Records that Are Submitted Behind the Scenes Are Routed to the Right Approval Process” Critical Update Postponed

Interest for Veeva: 

## ■ What is it?

- Previously, when you submitted a record behind the scenes—whether with a line of code, the Process Builder, or a flow—Salesforce picked the first approval process where the record met the entry criteria. It didn't check whether the user submitting the record (or the user supplied via submitterId) was an allowed submitter
- Now, when a customization (such as an Apex class or a process) submits a record for approval, Salesforce picks the first approval process where the record meets the entry criteria **and** the submitter ID is an allowed submitter

## ■ What do I need to know?

- This critical update, released in Summer '16, was scheduled for auto-activation in Spring '18, but has been postponed to Winter '19





# Security & Identity

Encrypt More of Your Customers' Personally Identifying Information

Let Users Log Out of All Apps at Once with Single Logout

SAML Signing Certificate Has Been Retired

Turn Off Masking for Encrypted Data Critical Update to Auto Activate

Health Check: Choose a Default Baseline and Rename Baselines as Needed

# Encrypt More of Your Customers' Personally Identifying Information

Interest for Veeva: 

## ■ What is it?

- Protect more of the personally identifiable information (PII) in standard fields on accounts and person accounts
  - On accounts and person accounts, you can encrypt
    - Billing (Street, City) / Shipping (Street, City) / Site

## ■ What do I need to consider?

- Before encrypting any data on any Veeva CRM objects, review Veeva's position on Shield Platform Encryption detailed here:  
[https://crmhelp.veeva.com/doc/Content/CRM\\_topics/General/SFDC\\_Shield.htm](https://crmhelp.veeva.com/doc/Content/CRM_topics/General/SFDC_Shield.htm)

## ■ How do I enable it?

- To use this feature, you must activate the “Turn Off Masking for Encrypted Data” critical update



# Let Users Log Out of All Apps at Once with Single Logout

Interest for Veeva: 

## ■ What is it?

- With single logout (SLO), your users are logged out from all connected apps (service providers or relying parties) when they log out of the identity provider
- Likewise, when your users log out from a connected app, they are logged out of the identity provider and all registered connected apps
- SLO can improve security and usability. Previously, your users had to remember to log out of each app separately

## ■ What do I need to consider?

- To use this feature, the identity provider and all connected apps must be configured for single sign-on and registered for SLO
- SFDC supports front-channel SLO, meaning your users are only logged out of their registered apps if they explicitly log out of one using their browsers
- Having a session expire does not cause them to be logged out of the other apps registered for SLO
- Previously, SFDC only supported front-channel SAML SLO for which SFDC was the identity provider



# SAML Signing Certificate Has Been Retired

Interest for Veeva: 

## ■ What is it?

- As previously communicated in Default Certificate to Retire on August 7, 2017, the proxy.salesforce.com default certificate has been retired due to its expiration and for security best practices
- If your Salesforce org uses this certificate (the “Default Certificate”) for a SAML single sign-on (SSO) configuration, act now to prevent a possible interruption of service

## ■ What do I need to do?

- Review the SFDC Winter 18 Release Notes for full details!



# Turn Off Masking for Encrypted Data Critical Update to Auto Activate

Interest for Veeva: 

## ■ What is it?

- On November 29, 2017, the Turn Off Masking for Encrypted Data critical update will be applied to all orgs that use Shield Platform Encryption
- This critical update gives you access to new and updated Shield Platform Encryption features
- It also gives users a more consistent experience when they access encrypted data, and reduces confusion between data that's masked and data that's encrypted

## ■ What do I need to consider?

- Before encrypting any data on any Veeva CRM objects, review Veeva's position on Shield Platform Encryption detailed here:  
[https://crmhelp.veeva.com/doc/Content/CRM\\_topics/General/SFDC\\_Shield.htm](https://crmhelp.veeva.com/doc/Content/CRM_topics/General/SFDC_Shield.htm)
- Automatic activation only applies to customers who haven't already activated the update



# Turn Off Masking for Encrypted Data Critical Update to Auto Activate

- **What do I need to consider? (continued)**
  - When you activate this critical update, encrypted data is visible on-screen. That is, encrypted data is not hidden by masking characters
  - To hide data from unauthorized users, you must use field-level and object-level security, regardless of whether the data is encrypted
  - After you have activated this critical update, the View Encrypted Data permission applies only to Classic Encryption



# Health Check: Choose a Default Baseline and Rename Baselines as Needed

Interest for Veeva: 

## ■ What is it?

- You can now set a default baseline that Security Health Check opens upon page load
- You can change the baseline name, API name, and default baseline using the Edit feature in the Baseline Controls menu

## ■ How do I use it?

- When importing an XML file to use as a custom baseline, you are now prompted to enter a baseline name and a unique API name. Previously, you included that information in your XML file



# Customization

Flow Enhancements

Process Builder Enhancements

Access Encrypted Data with Flows and Process Builder

Retain More Debug Logs for Longer



# Flow Enhancements

Interest for Veeva: 

## ■ What are the enhancements?

- *Set More Variable Values in the Flow Component*
  - You can now set values for your picklist and multi-select picklist variables directly from the properties pane
- *Configure a Flow to Wait for a Platform Event to Occur*
  - You can now subscribe to platform events in a flow Wait element. With platform events, a flow can wait for something to occur, inside or outside your org
  - Previously, a flow could wait only for a relative or absolute date/time value
  - Available within 24 hours after the Winter '18 release



# Flow Enhancements

- **What are the enhancements? (continued)**

- *Set Values for Picklist and Multi-Select Picklist Variables*

- In Lightning runtime, you can now set values for your picklist and multi-select picklist variables directly from the URL
- With this change, Lightning flow runtime has parity with Classic flow runtime, so your URLs work the same no matter which runtime experience you're using
- SFDC also added this functionality to the Flow component in the Lightning App Builder



# Process Builder Enhancements

Interest for Veeva: 

## ■ What are the enhancements?

### ■ *Start a Process When a Platform Event Occurs*

- Create a process that starts when a platform event (an event that occurs outside of your org) occurs
- As long as your org can receive a REST call about the event, you can start the process
- Available within 24 hours after the Winter '18 release

### ■ *Quickly Reference Specific Users and Queues in Your Processes*

- Instead of manually entering a user ID, simply search for that user by name. You can also search for queues
- The ID and Reference value types did not go anywhere. You can still enter the user or queue ID manually or reference a field value from a related record
- User and Queue are not available in criteria or action rows that were created before Winter '18. To use one of these new types in an existing process, create a new row



# Access Encrypted Data with Flows and Process Builder

Interest for Veeva: 

## ■ What is it?

- Access encrypted data from most elements in flows and processes, except when filtering or sorting records

## ■ What do I need to consider?

- Before encrypting any data on any Veeva CRM objects, review Veeva's position on Shield Platform Encryption detailed here:

[https://crmhelp.veeva.com/doc/Content/CRM\\_topics/General/SFDC\\_Shield.htm](https://crmhelp.veeva.com/doc/Content/CRM_topics/General/SFDC_Shield.htm)

- You can update the value for an encrypted field or reference an encrypted field in logic, but you cannot look up records based on a specific value in an encrypted field

## ■ How do I enable it?

- To use this feature, you must activate the “Turn Off Masking for Encrypted Data” critical update



# Retain More Debug Logs for Longer

Interest for Veeva: 

## ■ What is it?

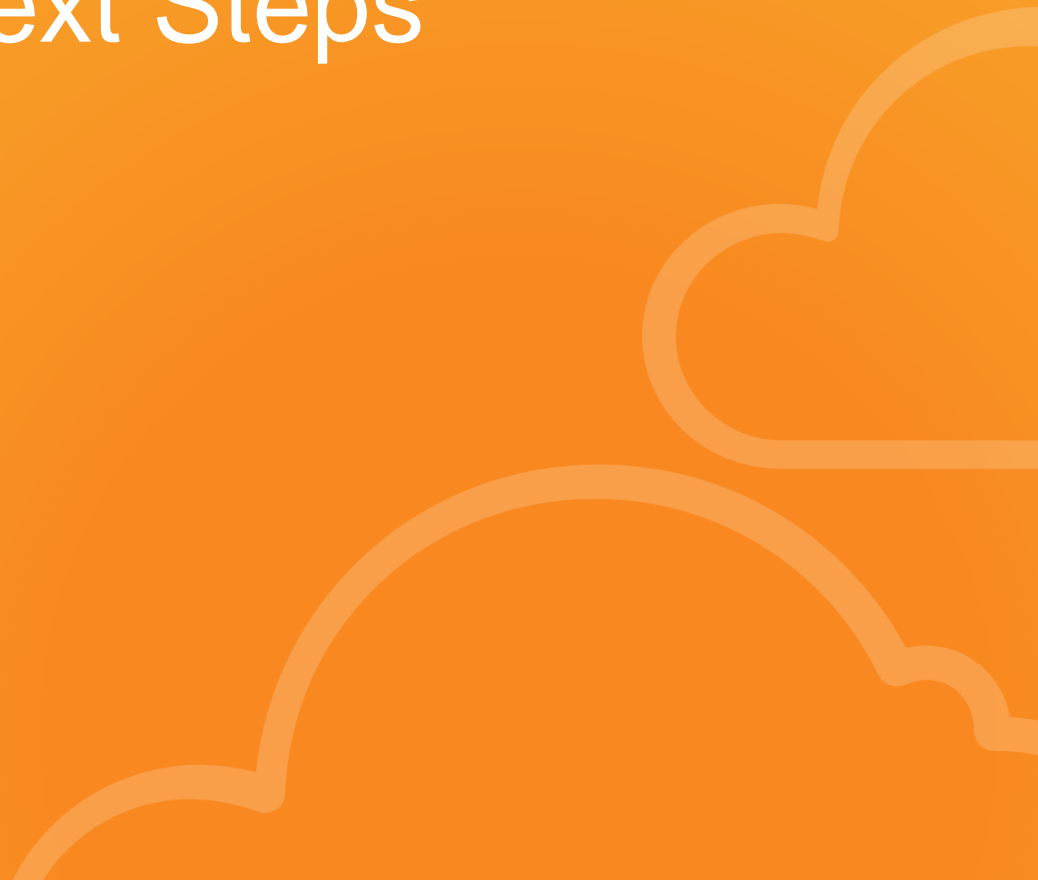
- SFDC now retains debug logs for 7 days
- You can generate a total of 250 MB of debug logs in a 15-minute window
- If you generate more than 250 MB of debug logs in a 15-minute window, your trace flags are disabled. SFDC sends an email to the users who last modified the trace flags, informing them that they can re-enable the trace flag in 15 minutes

## ■ What do I need to consider?

- Previously, you could generate up to 50 MB of debug logs. SFDC kept them indefinitely, deleting the oldest log each time that you exceeded the limit. SFDC removed the 50 MB limit and changed to a 7-day storage limit
- When your org is upgraded to Winter '18, all logs that are at least 7 days old are deleted



# Wrap Up and Next Steps



# Wrap Up

## ■ Lightning Experience User Interface

- Veeva's position is unchanged -- Veeva still does not support this UI
- Later releases of Veeva's Sunrise UI are going to provide customers with ability to enable this UI for the online platform as an optional change (SAFE HARBOR APPLIES)
- Please contact your Account Executive or Veeva Support should you require more information on Veeva's position on this feature

## ■ Shield Platform Encryption Enhancements

- Veeva's position is unchanged and is detailed here:  
[https://crmhelp.veeva.com/doc/Content/CRM\\_topics/General/SFDC\\_Shield.htm](https://crmhelp.veeva.com/doc/Content/CRM_topics/General/SFDC_Shield.htm)
- Please contact your Account Executive or Veeva Support should you require more information on Veeva's position on this feature



# Wrap Up

## ■ Lightning Framework/Connect Enhancements

- Veeva's position is unchanged -- Avoid complicating/extending already complex, mission critical Veeva CRM components with Salesforce1 Lightning Framework
- Veeva Support will not troubleshoot issues related to integrating Lightning processes into Veeva functionality
- Please contact your Account Executive or Veeva Support should you require more information on Veeva's position on this feature

## ■ Einstein-related Enhancements

- Veeva's position is unchanged -- Veeva is continuing to work with SFDC to understand the tools and capabilities of Einstein including Einstein Analytics (formerly Wave Analytics) and it's potential usage within the core product
- Please contact your Account Executive for more information regarding Veeva's support of the above item





# Wrap Up

- **Enterprise Territory Management Enhancements**
- **Health Cloud Enhancements**
- **Global Picklist Enhancements**
  - Veeva has not yet taken a position on the above items
  - Please contact your Account Executive for more information regarding Veeva's support of the above items



# Next Steps

- **Share this deck with your Veeva CRM admins to ensure they are aware of the SFDC capabilities for future requests**





Thank You