Salesforce.com Spring '18 Release

February 2018

Veeva

Table of Contents

- SFDC Release Schedule and Deck Intentions

- Summary of Enhancements and Changes by Category
  - Salesforce Overall
  - Customization
  - Security & Identity

- Wrap Up and Next Steps

SFDC Release Schedule

- Currently in Sandboxes which meet preview criteria
  - https://www.salesforce.com/blog/2017/12/salesforce-spring-18-sandbox-preview-instructions.html

- How can I tell if my Sandbox is on Spring '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

Winter '18 (not upgraded)   **Spring '18**

- Production Release
  - Between February 2nd and February 9th, depending on your production server
  - Schedule: https://status.salesforce.com/status

Deck Intentions

- Highlights features of the SFDC Spring '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/spring18/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 Classic
Force.com Is Now Lightning Platform
Deactivate Orgs You Do Not Use
Get Search Results for More Objects
Connect for Office: Update Required

Supported Browsers for Salesforce Classic

Interest for Veeva: ⭐⭐⭐

- Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11, and Apple® Safari® version 11.x on macOS

- The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported

- The term "latest version" is defined by the browser vendors – use the support for your browser(s) to understand what "latest version" means

- Some special set-up considerations and limitations apply depending on the browser used – review SFDC Help for more details!

Force.com Is Now Lightning Platform

Interest for Veeva: ⭐⭐

- In 2007, SFDC launched Force.com, their core platform technology

- SFDC is changing the name to Lightning Platform because, in the past 10 years, it has become so much more

- It will take some time to see every reference to Force.com removed from the SFDC product, but from here on out, it is Lightning Platform

Deactivate Orgs You Do Not Use

Interest for Veeva: ⭐

- ## What is it?
  - When an org has outlived its usefulness and it is time to move on, you can deactivate it

- ## What do I need to consider?
  - When you deactivate an org, you have 30 days to change your mind and reactivate it
  - After 30 days, the org is locked, and you must contact Veeva Support to have SFDC Support reactivate it
  - After 60 days, the org is permanently deleted from SFDC servers
  - If the org has released a managed package, you cannot deactivate it – contact Veeva Support to have SFDC Support assist

- ## How do I use it?
  - From Setup, you can deactivate an org from the Company Information page

Get Search Results for More Objects

Interest for Veeva: ⭐

- ## What is it?
  - – Email Message is now searchable

- ## What do I need to consider?
  - – Does not apply to Approved Email

- ## How do I enable it?
  - – On by default

Connect for Office: Update Required

Interest for Veeva: ⭐

- ## What is it?
  - Support for Connect for Office ended in 2017
  - If your users still use Connect for Office v1.8.1.6, it will not meet security certificate requirements after February 9, 2018

- ## What do I need to consider?
  - To avoid service disruption, SFDC recommends that you upgrade reps to Connect for Office v1.8.1.7 or migrate them to an alternative product

- ## How do I enable it?
  - Connect for Office v1.8.1.7 will be available for download by February 2018
  - Users can download Connect for Office v1.8.1.7 from their personal settings
  - Enter *Connect for Office* in the Quick Find box, and then select Connect for Office

Customization

Control the Visibility of Roles and the Role Hierarchy with a New Permission

Keep Your Record Type Value Settings When You Convert a Custom Picklist to a Custom Multi-Select Picklist

Access Enhanced Profile Features in User Management Settings Node

Control the Visibility of Roles and the Role Hierarchy with a New Permission

Interest for Veeva: ⭐⭐

- ## What is it?
  - Grant and revoke permissions to view roles and the role hierarchy in your org with the new View Roles and Role Hierarchy permission
  - In Spring '18, this permission is automatically enabled for all standard and custom user profiles associated with Salesforce licenses

- ## What do I need to consider?
  - Previously, only users with the View Setup and Configuration permission could view roles
  - If your org profiles rely on the View Setup and Configuration permission to view roles, make sure you switch those profiles to the new permission
  - Remember to also enable the Manage Roles permission if you want users to create, modify, or delete roles

Control the Visibility of Roles and the Role Hierarchy with a New Permission

- How do I use it?
    - Users who need access to roles and the role hierarchy for delegated administration automatically have this permission
    - Users with the View Role and Role Hierarchy permission can view roles and the role hierarchy via the API
    - Users can also view roles on the Roles page in Setup

Keep Your Record Type Value Settings When You Convert a Custom Picklist to a Custom Multi-Select Picklist

Interest for Veeva: ⭐⭐

- ## What is it?
  - SFDC enhanced the conversion of a custom picklist field to a custom multi-select picklist field to preserve an associated record type's value settings for the field

- ## What do I need to consider?
  - When you work with record types and convert a field from a custom picklist to a custom multi-select picklist, your record type value settings for the picklist field apply to the new custom multi-select picklist

- ## How do I enable it?
  - On by default

Access Enhanced Profile Features in User Management Settings Node

Interest for Veeva:

- ## What is it?
  - – SFDC moved the settings to enable the enhanced profile user interface and enhanced profile list views to the User Management Settings page

- ## What do I need to consider?
  - – These options previously resided on the User Interface page

- ## How do I enable it?
  - – On by default (not the settings but the UI change to administer the settings)

Security & Identity
Health Check Changes
Alert Users Before They Are Redirected Outside SFDC

Health Check Changes

Interest for Veeva: ⭐

- SFDC added 6 new health check settings
  - New high-risk security setting
    - Require Secure Connections (https) for all third-party domains
  - New medium-risk security settings
    - Enable Content Security Policy protection for email templates
    - Enable XSS protection
    - Enable Content Sniffing protection
  - New low-risk security settings
    - Require identity verification during two-factor authentication registration
    - Require identity verification for change of email address

Health Check Changes

- Update a Custom Baseline with New Settings
  - SFDC occasionally adds settings to Health Check to enhance security
  - Health Check settings are automatically added to the Salesforce Baseline Standard
  - If you have a custom baseline, it's easy to update it with the new settings right from the UI
  - The first time you load your custom baseline after new settings are added to Health Check, you are prompted to update it
  - Click Update Baseline to add the settings
  - If you cancel, you are prompted again the next time you load the baseline

- How do I use it?
  - From Setup, enter *Health Check* in the Quick Find box, then select Health Check

Alert Users Before They Are Redirected Outside SFDC

Interest for Veeva: ⭐

- ## What is it?
  - – Alert users with a warning message when they click links that take them outside the SFDC domain

- ## What do I need to consider?
  - – Applies to Veeva online only
  - – For added security, SFDC is also showing the full URL and domain the user is navigating to

- ## How do I enable it?
  - – In Setup, search for *Session Settings*
  - – Under Redirections, select Warn users before they are redirected outside of Salesforce

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
  - 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 and its potential usage within the core product
  - Please contact your Account Executive for more information regarding Veeva's support of the above item

Wrap Up

- Veeva has not taken a position on the items listed below. Contact your Account Executive for more information regarding Veeva's support of these items:
    - Enterprise Territory Management Enhancements
    - Health Cloud Enhancements
    - Global Picklist Enhancements

Next Steps

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

Thank you