Blaze your trail to innovation

The Winter ’18 Release empowers you and your teams to work faster and smarter, with expanded Lightning productivity benefits and Einstein intelligence.

For sales professionals, Winter ’18 provides greater productivity benefits with Lightning Dialer Local Presence & Enhanced Lead Convert in Lightning Experience. Sales teams can also quickly map opportunities to territories with new Territory Management enhancements in Lightning, enabling your sales teams to work smarter and faster in Sales Cloud.

For service professionals, Winter ’18 makes it easy for agents to deliver top-quality service with the expansion of our Lightning integration. New Macros in Lightning improve agent productivity by eliminating repetitive tasks & Field Service Lightning expands its mobile support to deliver amazing service from anywhere. Also, expanded communication enhancements through Live Agent, LiveMessage and Customer Communities ensures agents and customers are happier.

For marketers, Winter ’18 helps customers get smarter about their brand and their data. Now easily track your Facebook Ad investment with Advertising Studio and new integrated insights. Easily find your total addressable market with Salesforce DMP, and use Content Sharing with Email Studio to improve internal collaboration and ensure high quality, brand-approved content is published.

For IT professionals, expanded Lightning features in Winter ’18 help Admins and Developers quickly and easily build and collaborate through the Salesforce Platform. New Lightning theming, components and testing services are just a few of the top features that optimize how Admins and agents work in Salesforce. New security enhancements are also delivered through Shield, and richer intelligence is easily unlocked with Einstein Analytics. Finally, new Community enhancements enable greater engagement and personalized experiences across the Salesforce Platform.

All this and more is going live October 14, 2017. Preview all at www.salesforce.com/winter18
# Winter ’18 Release - Top Features

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## Winter ’18 Release - Top Features

### Platform
- **Platform Services**
  - Salesforce DX
  - Salesforce IOT Explorer
  - Big Objects and Async SOQL
  - Heroku Connect Enhancements
- **Einstein Analytics**
  - New Story Recommendations and Visualizations
  - New Connectors and Smart Data Prep
  - SDK with Encryption at Rest
  - Member Engagement
  - Mobile Notifications
- **Community**
  - CMS Connect
  - Dynamic Themes
  - Experience Enhancements
  - Custom Page Templates
- **Lightning**
  - New Components
  - Testing Service
  - Dynamic Pages

### Cloud Services
- **Premier Success Plans for Heroku & IOT**
- **Enhanced Premier Toolkit**
- **29 New Accelerators**
- **Help and Training Enhancements**
- **Premier+ Productivity Services**
### Enhanced Lead Convert in Lightning Experience
- Save time and effort by pre-recording voicemail messages.

### Enterprise Territory Management in Lightning Experience
- Visualize Contact Hierarchies, now in the Lightning Experience.

### Lightning Dialer: Local Presence
- Show up as a local number to prospects & watch conversions grow.

### Einstein: Opportunity Scoring (Pilot)
- Know which opportunities are worth your time, every time.

### Einstein: Activity Capture for Exchange
- Capture every email and event in Salesforce without data entry.

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With a streamlined one-click conversion flow and pre-populated account and opportunity records, the Enhanced Lead Convert is better than ever. Plus, now you can select record types, attach leads to existing opportunities, and see matching account details right in one screen.

With Winter ‘18, users in the Lightning Experience can see the Assigned Territories related list on accounts, and easily map opportunities to territories with the Territory field. Plus, it’s easier than ever for admins to set up Enterprise Territory Management in Lightning Experience, with its availability in the Lightning Setup tree.

Make it easier than ever for your outbound-calling reps to connect with customers and prospects. With Lightning Dialer Local Presence, the phone number that shows up on a recipient's caller ID will be coming from a local number, which means they're XX% more likely to pick up the phone. And that means more connects and higher conversation rates.

Winter ‘18 brings a new level of intelligence, productivity, and focus to the sales process. With Einstein Opportunity Scoring, sales reps can quickly and easily see which opportunities are the real "big deals," and which opportunities may not be as valuable to the business. Prioritizing time and focus during the sales cycle has never been easier or more efficient.

With the Winter ‘18 release, now customers who use Exchange 2013 and 2016 can connect their email accounts to Einstein Activity Capture to automatically log every customer communication to Salesforce. Give reps more time in their day by eliminating manual logging. And fuel the Einstein AI algorithms with a rich stream of sales activity data.
## Sales

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<tr>
<td>Work the way you want and send Engage emails directly from Outlook.</td>
<td>Leverage out-of-the-box attribution models to measure campaign influence.</td>
<td>Get started discovering new insights, fast.</td>
<td>Easily distribute and track funds to help partners build business for you.</td>
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Engage for Outlook provides sales reps with the flexibility to work the way they want: directly from their inbox. Engage for Outlook provides a side panel extension which surfaces all relevant prospect engagement history and score so they can send their personalized and more relevant 1-to-1 emails.

Click here to learn more.

Leverage out-of-the-box attribution models to track the impact of your marketing campaigns. Easily understand which campaigns are building more pipeline or closing more deals.

Click here to learn more.

Introducing a faster and simpler way to get started with Sales Analytics. With just one click, spin up your Sales Analytics app and get started discovering insights with pre-built dashboards that come ready to use out of the box. And if you need the freedom to customize your app, Smart Charts helps you build more intelligently. Based on the data selected, Einstein Analytics recommends the best chart types to use allowing you to be more productive.

Click here to learn more.

Hide the complexity of report Give partners an easy way to request marketing funds, so they can ask for resources that help grow your business. This out-of-the-box feature comes with a setup wizard that will help channel managers create a Market Development Funds (MDF) program, along with the reports and dashboards needed to track ROI.

Click here to learn more.
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<th>Service Feature</th>
<th>Description</th>
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<td><strong>Macros in Lightning Experience</strong></td>
<td>Close cases faster by eliminating repetitive tasks with a single click.</td>
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<tr>
<td><strong>Omni-Channel Routing &amp; Supervisor in Lightning Experience</strong></td>
<td>Optimize agent performance in real time and put the right experts on every case.</td>
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<td><strong>Milestones in Lightning Experience</strong></td>
<td>Help agents stay ahead of service-level agreements.</td>
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<tr>
<td><strong>Live Agent in Lightning Experience</strong></td>
<td>Create a modern, productive agent experience for real-time chats with customers.</td>
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**Equip agents with Macros to resolve issues faster.** Agents can quickly perform multiple actions in a single click, saving time, and ensuring consistency and accuracy. New in Lightning Experience, the Macro Builder can be leveraged to quickly and easily create new macros to handle those pesky, repetitive tasks. [Click here](#) to learn more.

**With Omni-channel Routing, now in Lightning Experience, companies can deliver smarter service by automatically routing work to the right agent, at the right time.** And because Omni-channel is embedded right within the Console, agents have an in-context, seamless view of the customer across all channels. Even route work from third-party system. Plus, managers are empowered with automatic, live updates on agents, work and queues with Omni Supervisor. [Click here to](#) learn more.

**With Milestones, agents have an easy, visual representation of the time they have to perform tasks and respond to customers.** Now, agents using the Lightning Service Console can keep a close eye on the time they have left to respond and meet Service Level Agreements for every customer. [Click here to](#) learn more.

**Give your agents an enhanced chat experience and a larger chat window with Live Agent in Lightning Experience, so they have more room to use the chat features they know and love.** And with access to past chat transcripts, agents can have the context they need to resolve an issue for a repeat customer. Plus, by connecting each live chat with the complete customer profile, agents can move quickly using customer chat sneak peek, keyboard shortcuts, and prewritten messages. [Click here](#) to learn more.
### Service

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<td>Initiate two-way conversations with any customer on Facebook Messenger.</td>
<td>Find new ways to engage customers across portals and communities.</td>
<td>Create a customer portal to deliver personalized, connected customer experiences.</td>
<td>Easily manage multiday jobs and schedule work across geographic areas.</td>
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**Top Features**

- **Service**

  Messaging companies is as simple as messaging friends with LiveMessage. With the messaging channel in your contact center, your agents can easily initiate outbound conversations with customers on Facebook Messenger. Use workflow and triggers to send automated messages to make it easy for customers to reply on their terms.

  Deliver incredible service by supercharging your Community engagement. Agents have Community 360 to get a full view of the customer and give great service. Use the Engagement Queue to target new members, MVPs, and more with relevant content. Members can use emojis to add fun and sentiment to conversations, and create streams to create personalized content feeds.

  Extend Salesforce to customers with an engaging, connected customer portal. Easily create a single place for customers to access their information and take action. Customers can log in to get a full view of their account, make changes, review updates, or kick off a process — like making an appointment, logging a ticket, or filing a claim.

  With Field Service Lightning, streamline complex field work with the automatic scheduling and optimization engine for multiday work. Simply drag and drop to adjust the times needed, or define geographical area, and schedule and dispatch work in bulk.

  [Click here](#) to learn more.
## Service

### Field Service Lightning: Multisignature Service Reports
Empower multiple stakeholders to sign off on completed work.

### Field Service Lightning: Android App
Offline-first Android app for your mobile workforce.

### Field Service Lightning: Personalized Mobile App Settings
Personalize the experience for every mobile worker.

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Now, mobile workers can easily capture multiple signatures from key stakeholders and view them in a single service report. Ensure every job is completed correctly the first time with sign-off from all those involved.

[Click here](#) to learn more.

The new Field Service Lightning Android app is an offline-first, native Salesforce app to connect your entire workforce. Mobile employees are empowered with instant updates, knowledge on-the-go, offline workflow, and capabilities for managing inventory, as well as updating work orders and job statuses from anywhere. And it’s easy to customize and brand the experience for your organization.

[Click here](#) to learn more.

With new capabilities for the Field Service Lightning mobile experience, companies can easily customize and deliver the right mobile experience to the right employees, depending on their user type. And you can customize the different experiences for each employee group in just a few clicks. When your app experience is personalized for your contractors and tailored for your technicians, they can each work better and faster.

[Click here](#) to learn more.

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Top Features

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## Email Studio: Content Sharing
Share content across teams and business units to increase productivity.

Content Sharing now allows Content Builder users to share content across teams and business units, increasing team productivity. Content Builder helps marketers create, edit, and manage content for Email Studio. Additional guardrails help to ensure that only great looking, on-brand content is approved and delivered to customers. 

Click [here](#) to learn more.

## Advertising Studio: Facebook Lead Analytics
Track your Facebook lead ads ROI all the way to actual revenue.

Introducing the ability to measure the ROI of Facebook and Instagram campaigns all through the customer journey to actual revenue. Previously, advertisers could only measure lead generation ads up until the form fill. Connect Pardot and Sales Cloud to Advertising Studio to get a simple dashboard of how your ads perform on your key business metrics.

Click [here](#) to learn more.

## Mobile Studio: SMS Campaign Object Integration
Get better visualizations to drive customer success with your people data.

MobileConnect, our enterprise SMS platform, allows Marketing Cloud Mobile Studio users to send SMS messages to a Campaign created in Sales, Service, or Community Cloud. Grow your audience in just a few clicks, with Marketing, Sales, Service, or Community Cloud data - connecting with your on-the-go customers at scale.

Click [here](#) to learn more.
### Marketing

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<td>Create even more alignment within your company by displaying Einstein Analytics on your company’s Command Center.</td>
<td>Salesforce DMP Total Audience Discovery: Find Your Total Addressable Market.</td>
<td>Leverage out-of-the-box attribution models to measure campaign influence.</td>
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Now you can bring even more data, and gain further alignment within your whole company with the addition of the Wave Analytics screen for your Command Center. Launch any of your Wave dashboards in the Command Center UI so you can compare & display the data in your Wave dashboard, alongside email, social, journeys, customer care, and sales data.

Now you can discover your total addressable market in one simple interface with Salesforce DMP Total Audience Discovery. Align your first party data asset and all available second and third party data to understand audience overlaps, which partners have key audiences, and view audience opportunities by data provider, category, and segment. Key reporting features include segment name, category, index score, overlap percentage, and price.

Leverage out-of-the-box attribution models to track the impact of your marketing campaigns. Easily understand which campaigns are building more pipeline or closing more deals.
## Salesforce DX
Build together and deliver continuously.

## Salesforce IoT Explorer
Transform connected products into engaging customer experiences.

## Big Objects and Async SOQL
Get big data computing for the Salesforce Platform.

## Heroku Connect Enhancements
Use Heroku Connect for global geo co-location.

## Shield Enhancements
Encrypt sensitive data at rest while preserving business functionality

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### Explore our collection of products and services that bring modern software delivery practices to developers on the Salesforce Platform. Whether you’re an individual developer or working as part of a large team, Salesforce DX provides you with an integrated, end-to-end lifecycle designed for high-performance agile development. And best of all, we’ve built it to be open and flexible, so you can build together with tools and practices you know and love.

**Click here** to learn more.

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### Built natively on the Salesforce Platform, Salesforce IoT Explorer lets you use the data generated by devices to create new experiences, business models, and revenue streams. Connected devices generate data that can create sales, service, and marketing opportunities. Real-time interactions can create a new type of engaged experience.

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### With Big Objects and Async SOQL, now you can store and query massive volumes of data directly within the Salesforce Platform. Big Objects make it possible to keep billions of records on the Salesforce Platform, orders of magnitude larger than what was previously possible. Async SOQL allows you to combine Big Objects data with your core CRM and Platform business data.

**Click here** to learn more.

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### Heroku Connect is a cloud-based data synchronization service, where service performance is tied to geographic location. With the addition of four additional geo regions, Heroku Connect now helps improve speed and performance for customers in six regions across the globe.

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### If you want more encryption coverage for your data then we’ve got your covered! Now you can add another layer of security to PII in Leads, Accounts, and Contacts; and you can now encrypt data posted on your Chatter feed. You can also access encrypted data with Flows and Process Builder. And lastly, you can track encryption key management usage in Event Monitoring logs to help meet auditing, compliance, and security requirements.

**Click here** to learn more.
Drive smarter insights and impress with new story visualizations in Einstein Discovery. Einstein now automatically suggests improvements to your data model so you can surface the best answers, explanations and recommendations. View your insights in a story generated in just one-click, and with the new Story Timeline feature, you can clearly see how your business will change over time allowing you to work smarter.

With Connectors, you can easily integrate data not only from Salesforce, but also from third-party web-based stores, all without having to write a single line of code. And with Smart Data Prep, Einstein intelligently suggests the right transformations to make in your data, and helps guide users in creating the best datasets no matter your technical ability.

Now you can extend Einstein Analytics to every part of your business. The SDK ensures that apps are easy to create, and provides a seamless integration between Analytics and Force.com. Use the power of Einstein Analytics with your existing apps, or even take it off-platform to use in remote apps.

Be productive on the go with notifications now pushed to your Analytics mobile app. Stay on target with goals and monitor how your business is tracking with the same benchmarks you set in the desktop now synced directly to your mobile device. Get a quick glance of your most important KPIs, and easily run your business from wherever you are.

Click here to learn more.
## Platform: Community

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<th>Member Engagement</th>
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<td>Leverage CMS content to create a beautiful community, faster.</td>
<td>Personalize every user’s experience with a tailored look and feel, branding, and content.</td>
<td>Find new ways to engage customers across portals and communities.</td>
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Get more from your existing CMS. Whether you use Adobe Experience Manager, WordPress, SiteCore, Drupal, or SDL Tridion, you can bring CMS content into your community. Reuse headers, footers, banners, and blogs to create a seamless experience. Dynamically render your components, CSS, HTML, and JavaScript on community pages for consistent branding, authentication, and ease of maintenance.

Click here to learn more.

Create personalized experiences for every user. Using CRM data, you can target different audiences with unique content. You can also tailor the branding, theme, and content of a community space for a specific visitor. For example, surface different content for a distributor than a reseller. Or deploy a community for customers and support multiple brands in your portfolio.

Click here to learn more.

It’s easier than ever to drive community engagement. Community managers have the Engagement Queue to filter for new members, MVPs, and more. Members can use emojis to add fun and sentiment to conversations, and streams to create personalized content feeds. Service agents have Community 360 to get a complete view of the customer to provide better, more prescriptive answers.

Click here to learn more.
**New Components**

Accelerate app development with over 24 new components.

**Testing Service**

Unit test your custom components to perform quickly and accurately.

**Dynamic Pages**

Admins can now deliver more personalization for every user.

**Experience Enhancements**

Streamlined legibility, density, layering, and contrast.

**Custom Page Templates**

More flexibility than ever on page layout and structure.

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*Winter ‘18 is a major release of Lightning components for the Salesforce developer and admin community. We are delivering over 25 new components for use by our developers and admins to accelerate app development and customization.*

[Click here](#) to learn more.

*Now you can conduct unit tests on your Lightning components to understand their performance and downstream impacts. Lightning Testing Service helps ensure you build and customize with confidence.*

[Click here](#) to learn more.

*With Dynamic Lightning Pages, admins can declaratively build better experiences with more control over what end users see. Use component properties to make a component appear or disappear depending on workflow or related values. This means targeted personalization for every user.*

[Click here](#) to learn more.

*Lightning Experience has been infused with Trailhead fun. Lightning is easier to read, with clear hierarchies between text box headers, body, and buttons. It’s easier to see, with more compact design that allows for greater density and more efficiency when you work. And, it has higher contrast and depth between elements, making it easy to see and interact with components and their constituent parts.*

[Click here](#) to learn more.

*Go beyond the templates Salesforce provides for home pages, record pages, and console apps. Developers can create any custom Lightning page template they need, so you can provide your team with any page layout they need to succeed in Lightning Experience.*

[Click here](#) to learn more.
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<th>Einstein Search Dictionaries (BETA)</th>
<th>SEO Enhancements</th>
<th>Service Anywhere APIs</th>
<th>New Catalog Module</th>
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<tr>
<td>Never miss a search term again</td>
<td>Improve Page Rank, Build Traffic, and Grow Faster</td>
<td>Unlock new omni-channel customer service capabilities</td>
<td>Simplify how you build and edit categories on your website</td>
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</table>

Einstein Search Dictionaries consumes all site searches and surfaces terms that are being searched for but are not in retailer's dictionaries. Then algorithms analyze data across the entire ecosystem of Commerce Cloud sites to detect relationships between search terms and recommend which synonym list to assign them. [Click here](#) to learn more.

Commerce Cloud Digital provides merchants with the tools they need to create informative, relevant, keyword-rich pages that boost search engine results. Newly enhanced out-of-the-box tools make it easy to incorporate SEO best practices into site design to help search engines crawl and index sites for more favorable page rank.

Service Anywhere APIs pull Order Management data and share it with Digital and Store, enabling customer service reps to order on behalf of, or modify a shopper's basket. The APIs also power self-service returns/exchanges, buy online return in store and more— allowing merchants to offer customer service options throughout the shopper journey.

A new Catalog Module simplifies how merchants build and edit categories on their website using drag and drop tools and product thumbnails images. Search and date-range filters allow merchants to identify available products and view category pages in past or future states. A pop-up menu also helps merchants organize products by color, size, and more.
### Top Features

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<th>Text Highlights</th>
<th>Document Outline</th>
<th>Anchor Links</th>
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<td>Search and access your Quip docs from anywhere in Salesforce through the file picker.</td>
<td>Broadcast Quip docs to your groups in Chatter.</td>
<td>Collaborate on Quip docs in living color with multi-color text highlights.</td>
<td>Quickly navigate long-form Quip documents in a single click.</td>
<td>Send teammates where you need them with shareable anchor links.</td>
</tr>
</tbody>
</table>

**Quip and Chatter were made for each other.** Publicize Quip docs to your groups using the file picker integration or simply paste a link to a Quip doc and Chatter will automatically unfurl the URL. [Click here to learn more](#).

**Write documents in living color with multi-color highlights** – perfect for emphasizing important text, color coding drafted content, or communicating status of tasks.

**Give your teammates an easy way to navigate longer documents** – project plans, product requirements, and knowledge base articles – with document outlines. Document outlines scan the headings in your document and automatically create a clickable table of contents so readers can quickly jump from section to section in your document.

**Direct teammates to a specific part of any document or spreadsheet with an anchor link** – a simple way to generate a shareable link for any line, spreadsheet cell, task, or image. When clicked, Quip will bring your teammate directly to the point of interest – ready to collaborate.

[Click here](#) to learn more.
Customizable Financial Accounts & Rollups

Supercharge financial accounts with customized views and rollups.

Admins can now customize financial accounts to surface the most relevant client information to users. Plus, the enhanced rollup capability gives admins the flexibility to not only configure custom rollup rules for financial accounts but also create rollups to multiple joint owners. Click here to learn more.

Financial Services Cloud for Retail Banking

Increase banker productivity and be the bank your customers love.

Financial Services Cloud for Banking increases productivity and visibility into customer needs with new objects and rollups, a powerful Banker Lightning Console, and a packaged Personal Banker profile. This out-of-the-box functionality reduces time-to-value. Integrations to best-of-breed operational banking systems enable end-to-end digital transformation. Click here to learn more.

Intelligent Needs-Based Referrals and Scoring

Intelligently source, track and prioritize referrals across different lines of business.

With Intelligent Needs-Based Referrals and Scoring, financial institutions can manage a seamless and scalable referral process across multiple lines of business. Now you can source, intelligently score, prioritize and convert referrals in a simple flow. Advisors and bankers can even identify top referrers, as well as track their own referral activity all in one holistic view. Click here to learn more.
### Top Features

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<th>Health Cloud Lightning Console</th>
<th>Health Cloud Empower Timeline</th>
<th>Householding Map</th>
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<td>Take care team productivity to the next level.</td>
<td>Improve collaboration across the entire care team, from physicians to family.</td>
<td>Take action at the point of insight with targeted lists</td>
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The power of lightning is now inside Salesforce Health Cloud! This upgrade improves performance and speed, especially when working across the customer success platform. Lightning also gives you the ability to customize your workflow with lightning components and apps so you can get more done, faster.

*Click here* to learn more.

With Health Cloud Empower Timeline, caregivers can view a patient's health history, including clinical and non-clinical events, from any device. Empower the entire care team, including patients, to keep track of their care from anywhere.

*Click here* to learn more.

The Householding Map allows care coordinators to view all of a patient's relationships, from physicians to family members. Improve your team's ability to work together across different care plans to support patients more holistically. And empower families to support patients at every step of their care journey.

*Click here* to learn more.
Cloud Services

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<td>Get more out of Salesforce’s new capabilities with Premier &amp; Signature Success Plans.</td>
<td>Your go-to for Premier tools, tips, &amp; how-to’s — newly designed with you in mind.</td>
<td>29 new 1:1 expert engagements designed to accelerate your value</td>
<td>Find answers, advice, and support faster (and easier) than ever.</td>
<td>We’ll show you how to to customize Sales Cloud and do it for you.</td>
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Heroku and IOT Cloud customers now have Premier Success Plans available. Plans provide access to Accelerators; quick, personalized work sessions that solve specific Salesforce challenges. Enhanced Support can help you resolve technical challenges quickly, giving you access to Salesforce experts and a quick response time. Click

The Premier Toolkit is designed to help Admins get started, and maximize their Salesforce value. Through brand new videos, more relevant content, and a streamlined design, this toolkit makes it easy to get answers when you need them.

29 new and refreshed accelerators that help you with prescriptive advice on improving the health of your implementation, Lightning adoption, getting up and running on Pardot, setting up Salesforce1, and taking full advantage of new features and products from Sales, Services, and Marketing. When combined with our extensive existing Accelerator catalog there is something for every role and every cloud to help you maximize the value of Salesforce.

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Meet an upgraded Help & Training — your portal to support, learning, and collaboration around all your Salesforce needs. Find answers easier and faster than ever now that our homepage is easier to navigate and self-serve. Plus, you’ll find brand new resources for our latest Salesforce Products, such as Quip and Salesforce Inbox.

*Premier+ Productivity Services combine the expert guidance of Accelerators with the time savings of Configuration Services - meaning we not only show you how to get things done, we do it for you. In this release, we’re introducing two Premier + Productivity Services:

- **Getting Started with Sales Cloud** — We’ll work together to identify two objects that we will then set up for you.

- **Sales Cloud Dashboard** — We’ll investigate and configure a dashboard with relevant KPIs and measurable Success Criteria.

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Top Features

**Cloud Services**

- **New Premier Success Plans for Heroku & IOT**
- **Enhanced Premier Toolkit**
- **29 New Accelerators**
- **Help & Training Enhancements**
- **New Offering: Premier+ Productivity Services**
Winter ’18 is Here!

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