

Salesforce Release Notes

Salesforce, Winter '21

Delivering innovations to help connect you to your customers, from anywhere





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SALESFORCE WINTER '21 RELEASE NOTES

The Winter '21 release delivers innovations across the Salesforce Customer 360 platform to help connect you to your customers, from anywhere.

IN THIS SECTION:

How to Use the Release Notes

Our release notes offer brief, high-level descriptions of enhancements and new features. We include setup information, tips to help you get started, and best practices to ensure your continued success.

Get Ready for the Release

Reading the release notes is a great step in preparing for the release. These other resources help get you, your org, and your users ready for what's coming your way. We add resources throughout the release when they become available, so check back often.

How and When Do Features Become Available?

Some features in Winter '21 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

We made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Salesforce Overall: Release Notes on Salesforce Help, Multi-Factor Authentication, Einstein Search Personalization, and Salesforce Anywhere (Beta)

Starting Wednesday, November 4, 2020, find the Salesforce Release Notes on Salesforce Help, the same place you go for help as well as the release notes for Commerce Cloud, Marketing Cloud, and Customer 360. Use the Multi-Factor Authentication (MFA) Assistant to help roll MFA out to your users. Get personalized search results based on your activity, location, and other factors, with Einstein Search. Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and Lightning Flow invocable actions (Beta). Also, read through our Customer 360 guides and solution kits to help solve complex business cases, add custom themes to in-app guidance, display specific survey pages to participants based on data, and more.

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

Service: Service Cloud Voice Streamlined Setup, Omni-Channel Supervisor for Calls, Einstein Bots Templates, and More

Get started with Service Cloud Voice using a streamlined setup, support for Sales Cloud, the Voice API Toolkit (generally available), and more. Let Omni-Channel supervisors view calls as they happen to improve training and onboarding. Build your Einstein Bot faster with a new guided template and strengthen intent models with Input Recommender (beta). Field Service Time Sheets let you track your employees' hours right inside your field service solution. Accelerate your customer service configuration with easy setup and built-in best practices. Learn about these and other new Service Cloud features.

Sales: Sales Cadence Improvements for High Velocity Sales, Global Models for Einstein Lead Scoring, Opportunity Deal Change Highlights, and Multi-Cloud Support for Billing

Organize and share sales cadences in folders, pause sales cadences, and change step ownership. Use Einstein Lead Scoring even when you don't have enough data of your own. Use opportunity deal change highlights to see what's changed in the pipeline. Create invoices and bills for orders that originate from B2B Commerce, Service Cloud, and other systems. Plus, Call Coaching users can share voice calls. Get more out of Einstein Activity Capture with new connection and configuration options. And sales reps get even more productive with emails and templates.

Industries: Document Management, Forecasting, Public Service Optimization, and Much More

Our industry-specific solutions work even harder in Winter '21 to bring you closer to your customers. Health Cloud brings you streamlined document management for patient intake, along with new inventory management and sales forecasting capabilities. Financial Services Cloud unveils a new community portal template, compliant data sharing, and improved record rollups. Consumer Goods Cloud helps you plan store visits and keep shelves stocked, and Manufacturing Cloud gives you finer control over rebates and account forecasts. Our new data processing engine works behind the scenes to help you leverage your Salesforce data for bigger business impact. On top of all that, meet the newest addition to our lineup of industry-specific solutions: Public Sector Foundation, with advanced support for government service providers and users!

Analytics: Einstein Discovery Fast Start Templates, Sync Out for Snowflake, Einstein Discovery Automated Model Refresh

Analytics includes Reports & Dashboards, Einstein Analytics, and Einstein Discovery. Get Einstein Discovery going more quickly and easily with Fast Start Templates. Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. Automate some of the manual steps required to update your Einstein Discovery predictive models with scheduled model refresh.

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Bots are faster to build and more collaborative with intent model enhancements. Opportunity Scoring has filters to let you decide which records and fields are considered. Personalization tailors search results to the way each user works in Salesforce.

Commerce: Order Management Enhancements and Enhanced Lightning B2B Commerce Capabilities

Check out what's new in Salesforce Order Management and Lightning B2B Commerce.

Communities: Experience Cloud, New Audience Criteria, Enhanced Build Your Own (LWC) Template, and Better Guest User Security

Our elves have been hard at work this release delivering new features and enhancements. We're revamping our image and introducing our new name: Experience Cloud. Take advantage of more granular audience criteria that let you vary record detail pages based on record fields. The latest Build Your Own (LWC) template is packed with changes, including support for an upgraded version of Lightning Locker, custom URL paths, and SEO. And your data is more secure than ever with the enforcement of several guest user security settings that were introduced in previous releases.

Salesforce CMS: Content Delivery Network, Local Content Import, and Folders

Share your public content with a content delivery network (CDN), import images and documents from your local drive to Salesforce CMS, and organize your CMS content with folders.

Mobile: Productivity Features and More Convenient Navigation

Get more done in the Salesforce mobile app with launchpad, activity timeline, and other productivity boosters. Notifications features give you even more control over your custom notifications. Mobile Publisher for Communities now supports Marketing Cloud push notifications (Pilot). Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and suggested actions (Beta).

Customization: Lightning Flow Enhancements, More Dynamic Lightning Pages, and Einstein Builder Updates

Build and test flows with new layout and debug options, and launch flows when records are deleted. Break up your record details and create more flexible Lightning pages with Dynamic Forms and Dynamic Actions in the Lightning App Builder. Recommend anything to anyone with Einstein Recommendation Builder (beta).

Security, Privacy, and Identity: Security Center and Mobile Device Tracking Generally Available, Required My Domain, and More Real-Time Monitoring Events and Field Encryption

Maintain security, privacy, and governance policies for multiple orgs with Security Center, now generally available. View and manage mobile device access to your org with Mobile Device Tracking, generally available. New Salesforce orgs get a My Domain by default and existing orgs must define one. Keep a closer eye on your org with three new Real-Time Monitoring Events. Encrypt fields associated with health intake documents, and encrypt some Financial Services Cloud documents.

Customer 360 Truth: A Secure, Single Source of Truth for All of Your Customer Data

Learn what's new with Customer 360 Truth. Give your users more identity verification options and data unification to enable personalized interactions. And use one app to create policies to monitor multiple Salesforce orgs.

Deployment: New Change Set Components

Send customizations from one org to another by adding these components to change sets.

Development: Create Your Own Salesforce App

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

Quip: Template Management, New User Engagement Template Metrics, Salesforce Data in the Relationship Map Live App, Filtered List Views, and More

Mark your embedded Quip documents as templates. Increase template adoption with the Template Library in Quip. Get granular user engagement metrics to see how users are employing Quip templates. Add inline live Salesforce data mentions to a Quip document or spreadsheet. Create hybrid Salesforce and Quip relationship maps.

Pardot: Email in Lightning, Einstein Enhancements, and More Customizations

Create, send, and manage your email templates and email content with an enhanced email experience. Connect to Salesforce CMS to host and reuse images for email marketing, and get rollup metrics on the email records you use most. You can also resync prospects faster after import errors are resolved and customize your Einstein Attribution success milestone.

Marketing: Transactional Sending and Behavioral Triggers in Journey Builder, Ecommerce Optimizer App in Datorama, Einstein in Interaction Studio

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Release Updates and Security Alerts: Generally Available with Improvements

View important updates and alerts in a single location in the generally available Release Updates. We added some enhancements to ensure that your Salesforce org stays up to date on all changes that affect its performance, security, and users.

Other Salesforce Products and Services

myTrailhead: Streamline Your Users' Login Experience with Salesforce Identity for myTrailhead

Salesforce Identity for myTrailhead offers quick, easy access to myTrailhead. Your users aren't required to register with Salesforce Trailhead or create a profile. Salesforce Identity for myTrailhead uses an authentication provider that you control, so it lets you grant myTrailhead access to a specific audience. For example, you can target myTrailhead access for your internal users or your community members.

Spotlight on Content

We added information about our latest content enhancements, including new solution kits, new videos, and a new home for Identity content. Legal documentation has been moved to its own section.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

How to Use the Release Notes

Our release notes offer brief, high-level descriptions of enhancements and new features. We include setup information, tips to help you get started, and best practices to ensure your continued success.

- We offer PDF and HTML versions.
- For the HTML version, your browser's settings determine the language you see. To change the language, scroll to the bottom, click **Change Language**, and select a language.
- The release notes include details about new and modified features. For information on known issues, visit the Salesforce Known Issues site.



Note: Until the new release is available to you, links from release notes to Salesforce Help, implementation guides, developer guides, and other documentation don't work. And sometimes the links point to material from the previous release.

Some of our documentation has preview versions available several weeks before the release. To access a preview version on Salesforce Developers, select **Preview** from the Documentation Version dropdown list.

IN THIS SECTION:

Use Filters to Zero In on the News That Matters Most

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Know What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively or in tandem with Lightning Experience as it evolves.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

Release Note Changes

Read about changes to the release notes, with the most recent changes first.

Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

Use Filters to Zero In on the News That Matters Most

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Experience

See which features are available in Lightning Experience, the Salesforce mobile app, and Salesforce Classic.

Edition

Which feature enhancements are available to you depends on your edition. Filter the release notes to show only the enhancements that are available in your edition.

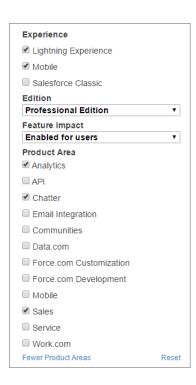
Feature Impact

Some features require you to enable or configure them before users can get the benefits. As an admin, filter the release notes to focus on or hide just those features. Or maybe you want to see only the features that are automatically enabled for your users.

Product Area

See only the products that your org uses. If your org does sales but not support, set up your release notes so that only the sales-related news appears.

To narrow down the list of release notes, click **Show Filters** on the right side.



You can share your filtered list of release notes with anyone. Select filters, copy the URL, and then distribute that URL however you want.

Know What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively or in tandem with Lightning Experience as it evolves.

One key to success during this time of transition is understanding what's available in one, both, or all the Salesforce experiences. To guide you, we added experience information to the applicable release notes at the highest level: for entire clouds or for individual features within clouds. Let's look at a couple of examples.

- A new Service Cloud feature is available in *both desktop experiences*, so the **Where** section of the release note says, "This change applies to Lightning Experience and Salesforce Classic."
- A new Sales Cloud feature is available in Lightning Experience only, so the Where section of the release note says, "This change
 applies to Lightning Experience only."

If a key feature is also available in the Salesforce mobile app, we mention that in the **Where** section of the release note. But you can also check the Mobile section for a complete list of what's new.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered
Sales	

IdeaExchange	Idea delivered
Use Outlook integration (Lightning for Outlook) with Corporate Shared Mailboxes	Shared Folder Support in the Outlook Integration
Drag and Drop Email Editor	Interactively Create Engaging Email Templates
An Email Template Editor that Doesn't Suck	Interactively Create Engaging Email Templates
Pardot	
Resolve Salesforce Sync Errors from the sync error page	Sync Prospects with Resolved Errors More Easily
Re-sync option for Salesforce Prospect sync error list	
Allow to send test mail without editing Email template	Preview and Test an Email in Lightning Experience
Preview Email Template HTML	
Send Test Emails without Entering the Editor	
Drag and Drop Email Editor	Create Engaging Email Content with Ease
Making images responsive in Pardot emails	
Make it easier for emails (& images) to be mobile responsive w custom templates!	
Undo button in email editor	
Easily Change Pre-header Text Through WYSIWYG Email Editor	
Add a customizable drag & drop CTA button in the WYSIWYG editor	
Make it easier to find images when editing emails	Source Images from Salesforce CMS for Emails
Service	
Allow Sharing Rule assignments to Knowledge Articles	Enhancements to Sharing for Lightning Knowledge (Generally Available)
Sharing Settings for Knowledgekav object	Use Knowledge Sharing with Guest Users and High-Volume Community Users
Email-to-Case loop	Enhance Security with a New Threading Behavior for Email-To-Case
Analytics	
New Fields - Add to Custom Report Types	Auto Add Fields to Custom Report Types (Beta)
Schedule Reports as Attachments and add Adobe PDF, Excel Option	Subscribe to Get Report Results Delivered by Email (Generally Available)
Enable Custom Calendar (Fiscal Period) in Wave	Get Custom Fiscal Year Support in Einstein Analytics (Generally Available)

IdeaExchange	Idea delivered
Reset filters keeps embedded dashboard filters when saved views is enabled	Protect Data in Embedded Dashboards with Locked or Hidden Filters
Event Monitoring for Einstein Analytics (Wave) dashboard and lens downloads	View Einstein Analytics Data Downloads in Your Event Log Files
Customization	
Allow OR and Condition Logic in Get/Update/Delete Records in Flow	Use AND, OR, and Custom Operators Across All Flow Builder Elements
Debug Screen Flows running as a specific user	Debug Flow Errors in Sandbox Org as Another User
Flow builder: align canvas elements (Snap-to-Grid)	Place Flow Elements Automatically with Auto-Layout (Beta) (partially delivered)
Keep current type in Text Template instead of defaulting to Rich Text	Text Template Setting Is Saved
Process Builder & Flows use commas as "Or" logic in filters	Use AND, OR, and Custom Operators Across All Flow Builder Elements (partially delivered)
Workflow, Flow, Process Builder Triggered on Delete	Trigger a Flow to Run Before a Record Is Deleted (partially delivered)
Development	
Add support for HTTP PATCH verb	Update Resources with the PATCH HTTP Method in Apex Callouts

Release Note Changes

Read about changes to the release notes, with the most recent changes first.

March 18, 2021

REMOVED: Recalculate List Email Statistics with Confidence

Removed this release note because the feature was pulled from the Winter '21 release.

January 4, 2021

Enable Read and Write Access on User Records for the Identity Connect Integration User

Added announcement of new Identity Connect 3.x managed package and permission set.

End of Support for Internet Explorer 11 in Lightning Experience

Added release note with Internet Explorer 11 end of support information.

December 14, 2020

Introducing Vaccine Management

Added announcement about Vaccine Management capabilities on the Salesforce platform.

Other Enhancements in Salesforce Maps

Added details about the Auto Check Out permission that's now in permission groups.

December 7, 2020

Metadata API on page 615

Added new enums on the FlowActionCall subtype of the Flow metadata type.

December 2, 2020

Plan Customer Visits Safely

Introduced the Salesforce Maps field safety kit for minimizing the risk of exposure to COVID-19 among employees and customers.

November 30, 2020

UI Changes for Lightning Web Components

Added information about a UI change for errors in forms and detail pages.

Bot Options Menu Behavior Was Changed

Added information about a behavior change to the Transfer to Agent option within the Bot Options Menu.

Benefit from AI-Powered Einstein Search in Government Cloud

Added note that Einstein Search is available in Government Cloud

Get Improved Performance and Granular Control Over Batch Record Rollups

Added See Also links to the Define Rollup Settings for Objects and Record Rollup Batch Jobs topics in the Financial Services Cloud Administrator Guide.

November 16, 2020

Autofill Prospect Location Is Temporarily Unavailable

Changed the date for the temporary retirement of this functionality from November 30 to December 14 as there was a delay in the communications timeline.

Take Analytics Anywhere with Mobile Offline (Beta)

Added information about a new feature for iOS users.

Einstein Vision Endpoint That Returns Examples Is Deprecated

The Einstein Vision endpoint that returns all examples for a specific label is deprecated as of December 3, 2020.

Einstein Language Endpoint That Returns Examples Is Deprecated

The Einstein Language endpoint that returns all examples for a specific label is deprecated as of December 3, 2020.

Enhance Security with a New Threading Behavior for Email-To-Case

Updated a line to reflect new (postponed) auto-enforcement date.

Skip Identity Confirmation at Login Permission Was Clarified

Added a new release note about the Skip Identity at Login permission.

Metadata API

Added a new field to the LiveMessageSettings metadata type.

Correlate Threat Data Easier with Restructured JSON Format

Added information about the restructured JSON content of the SecurityEventData field in Session Hijacking objects. threat events in the org.

UI Changes for Cloning Records

Added information about a UI change for console navigation users.

Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help

Added a See Also link to a blog post that explains why we moved Salesforce Release Notes to Salesforce Help.

Download Release Notes PDFs for Salesforce Releases Before Winter '16

Added a See Also link to a blog post that explains why we moved Salesforce Release Notes to Salesforce Help.

November 9, 2020

Unleash New Flexibility with Dynamic Actions on Desktop (GA and Beta) and Mobile (Beta)

Updated information on standard objects, to indicate that dynamic actions are Beta for all standard objects on desktop.

Postponed "Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files" Release Update

The update, originally scheduled for enforcement in Summer '21, is now enforced in Summer '22. Added a recommendation not to enable this update if your users access Salesforce using iOS or Apple Safari.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Update, Postponed)

Changed the auto-enforcement date to Winter '22.

View All Users and Other Permissions Removed in Guest User Profiles (Previously Released Update, Enforced)

Updated the timeline of enforcement. The permissions are removed with the Winter '21 release.

Configure Custom Flow Screen Components and Actions That Work for Multiple Objects More Easily

Updated the title and added Why and How sections.

Einstein Bots: Session Timeout Updates

Updated to define changes to the bot session timeout: 30 minutes for Chat channels, and 8 hours for Messaging channels.

Routing Was Updated for Einstein Bots

Einstein Bots using skills-based routing now supports queue position for skill overrides.

Autofill Prospect Location Is Temporarily Unavailable

Added a note on the temporary suspension of Pardot's ability to autofill prospect location data.

Convert Multi-Value Fields to String Fields in SAQL (Beta)

Added Beta disclaimer and information on how to enable the feature.

New and Changed Objects

Added information about the Name field on the Survey object.

Added a new ManagedContentInfo object to Standard Objects.

Clarified information about how the IsOptedOut field on the MessagingEndUser object has been removed. Use MessagingConsentStatus and IsFullyOptedIn fields instead.

Metadata API

Updated the changed behavior of the enableSecureGuestAccess field on the SharingSettings type.

Added a new votingEnabled field to the KnowledgeSettings type.

Added a new optimizationServiceAccess field to the FieldServiceSettings type.

November 6, 2020

Salesforce Maps: Uber Integration, Territory Planning Alignment Comparisons, and Advanced Route Assignments for Account Teams

Introduced Salesforce Maps features and enhancements for Winter '21.

November 4, 2020

Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help

Added information about Salesforce Release notes on Salesforce Help.

Download Release Notes PDFs for Salesforce Releases Before Winter '16

Added information about how to download Salesforce Release notes from before Winter '16.

October 28, 2020

Let Agents Pause and Resume Call Recordings

Added link to instructions about enabling the pause and resume call recording feature.

Update Your Android Devices' Security Patch

Added a release note for an Android device security consideration.

Get Better Search Results for the Name Field in Asian Languages

Added information about improved search results for names in Asian languages.

Enable Secure Static Resources for Lightning Components (Update, Postponed)

Enforcement of this release update is postponed to Summer '21.

Shared Folder Support in the Outlook Integration

Added information about the specific Exchange Online build required for shared mailbox and calendar support.

Send Meaningful Messages Using Custom Notifications

Modified the information about how to customize the feature and added a link for more information.

Removed: Einstein Form Reader Objects from Health Cloud Has New and Changed Objects

These objects isn't ready for showtime. We'll let you know when they are ready.

Stay Secure with the Revised Telephony Integration REST API

Clarified that the old version of this API is available until February, 15 2021.

Routing Was Updated for Einstein Bots

Einstein Bots using queue-based routing now supports queue position for queue overrides.

October 21, 2020

Lightning Web Components Playground Retirement

Lightning Web Components Playground is being retired on February 1, 2021.

Enhance Security with a New Threading Behavior for Email-To-Case

Clarified implications of update to threading method and added see also to KB.

Plan for WDC's Retirement

Removed this topic because the retirement date for WDC is under review.

Learn More with Prediction Fields in Einstein Case Classification

Added release note about using the new PredictionField field on the AlRecordInsight object to compare prediction results with case actuals.

New and Changed Objects

Added information about the new PredictionField field on the AlRecordInsight object.

Stay Secure with the Revised Telephony Integration REST API

Added release note about a change to the Service Cloud Voice Telephony Integration REST API.

Einstein Bots: Session Timeout Updates

Updated to define changes to the bot session timeout: 30 minutes for Chat and Messaging channels.

Securely Manage Customer Data with Salesforce Customer 360 Privacy Center

Added information on how to access Customer 360 Privacy Center, and updated feature names.

Log In to myTrailhead in One Easy Step

Added a release note to announce a new feature: Salesforce Identity for myTrailhead.

October 14, 2020

Let Your Community Users, Customers, and Partners Verify Their Identities with SMS

Added license requirement.

Tooling API New and Changed Objects

- Added Embedded Service objects introduced in earlier versions to the *Tooling API Developer Guide*.
- Added information about the new ReleaseUpdate object.

Metadata API

Added information about these new fields and values of the FlowScreenField subtype of the Flow metadata type: the fields field; the Region and RegionContainer values of the fieldType field.

Upgrade to the Winter '21 Versions of Einstein Analytics for iOS and Android

Added information about the latest version of Einstein Analytics for mobile users.

Metadata API

Added information about the new embeddedServiceCustomizations field on the EmbeddedServiceMenuSettings metadata type.

Metadata API

Added a release note about the removal of the enableInvocableFlowFixEnabled field.

Cruise Through the App with Improved Scrolling

Added beta disclaimer and feature setup information.

The Last Modified Date Is Back on page 411

Announced the reintroduction of a last modified date on Classic Knowledge search results.

New and Changed Objects

Added LocationWaitlist, LocationWaitlistedParty, and LocWaitlistMsgTemplate objects.

New and Changed Objects

Updated to indicate that the PermissionsViewFlowUsageAndFlowEventData user permission field has been deprecated from the Profile object.

Protect Your Data with Salesforce Shield

Use Shield Platform Shield to add an extra layer of security to your CPQ data.

Legacy Work.com Is Now WDC

Added a topic about a renamed feature.

Einstein Bots: Session Timeout Updates

Updated to define changes to the bot session timeout: 30 minutes for Chat and 8 hours for Messaging channels.

October 7, 2020

Spotlight on Content

Added information about our latest content enhancements, including new solution kits, new videos, and a new home for Identity content.

Maintain Permission Sets and Public Groups When Using Identity Connect

Removed the release note notifying users about the general availability of Identity Connect 3.0.1.1. Added a release note to notify users that Identity Connect 3.0.1.2 is now available to replace Identity Connect 3.0.1.1.

Send One-to-Many Messages with Broadcast Messaging

Added a release note describing the new Broadcast Messaging feature in Digital Engagement and Work.com.

Salesforce for Outlook Retirement Rescheduled

Release notes were updated to reflect the new June 2021 - June 2023 phased retirement schedule. Previously, Salesforce for Outlook retirement was scheduled for December 2020.

New and Changed Objects

Added information about new objects for Quip: CollabUserEngagementMetric and CollabUserEngmtRecordLink.

Introducing Our New Name for Einstein Analytics: Tableau CRM

Added a release note introducing the new name of Einstein Analytics.

Stop Automated Field Updates from Suppressing Email Notifications (Previously Released Update)

This update is now available only by contacting Salesforce Customer Support.

Prepare for the Microsoft Edge Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Added a release note about Microsoft Edge changes to SameSite cookie behavior.

Prepare for Firefox Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Added a release note about Firefox changes to SameSite cookie behavior.

Focus Your Predictions in Einstein Prediction Service

Added a release note about the default behavior change for the predict API call in Einstein Prediction Service.

New and Changed Objects

Added information about a new object for CommercePayments: GtwyProvPaymentMethodType.

Manage Your Platform Event Trigger Subscriptions from the User Interface

Removed incorrect information about suspending a trigger to modify its logic. After modifying and saving a trigger, the subscription is resumed automatically.

September 30, 2020

Get Search Results for Newly Searchable Objects

Added release note listing objects that are now searchable.

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced) on page 531

Explained usage of enhanced profile user interface to enable access to a public Apex controller that's part of a managed package.

Build Multi-Column Screens in Flow Builder (Pilot)

Added a flow runtime requirement, details about the pilot program, instructions, and examples.

Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience

Added a permission requirement, instructions, and other details about the feature.

Flow and Process Run-Time Improvements in API Version 50.0

Updated the title, which was previously "Lightning Flow Run-Time Improvements in API Version 50.0."

Streamline How Your Mobile Users Access Dashboards from a Record Page

Added a release note describing a new way to streamline Einstein Analytics dashboard access in the Salesforce Mobile App.

Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android

Added a release note describing the new Einstein Analytics navigation item for Lightning apps.

Pardot Support for Internet Explorer 11 Is Being Retired on December 31, 2020

Added a release note to notify users that Pardot is ending support for Internet Explorer 11 at the end of the calendar year.

Interactively Create Engaging Email Templates on page 220

Updated the release note topic to refer to permissions, not permission sets.

See the Bigger Picture with a Monthly Calendar View on page 423

Added a release note for the monthly calendar feature on the Salesforce Mobile App.

New and Changed Objects on page 582

Added a release note that explains two new fields added to the FlowInterviewLog and FlowInterviewLogEntry objects, for getting information about screen flow labels in custom reports.

Public Sector Solutions: Licensing and Permitting Management Made Simpler, Faster, and Transparent (Generally Available) on page 275

Updated the product name in the section, which was previously Public Sector Cloud.

Transform Government Services with Public Sector Solutions on page 276

Updated the release note topic to state that users can only view inspection details and not schedule inspections.

Metadata API

Added information about the new embeddedServiceCustomizations field on the EmbeddedServiceFlowConfig metadata type.

Place Flow Elements Automatically with Auto-Layout (Beta)

Added instructions on how to use the feature.

Debug Autolaunched Flows Directly on the Canvas (Beta)

Updated the release note to highlight beneficial features, and added instructions on how to use them.

Add Faceting to More Data in Dashboards on page 338

Added a release note to inform users that data source connections are available for Salesforce objects and live datasets in Einstein Analytics Dashboards.

Manage Return Merchandise Authorizations on page 384

Added a release note describing the new Return Merchandise Authorization feature in Salesforce Order Management.

September 23, 2020

Transfer Chats to Other Agents, Queues, and Skills

Added a release note to announce support for transferring skills-based routed chats.

Override Entity Permissions When Using <apex:inputField>

A new attribute on <apex:inputField> was added first in Winter '21 and then back-ported to Summer '20.

Drive Your Multi-Factor Authentication Implementation from One Place

Updated the availability information in the "When" section, and added a link to the Multi-Factor Authentication topic in Salesforce Help.

Move Over Community Cloud, There's a New Kid in Town: Introducing Experience Cloud

Added release note introducing the new name of Community Cloud.

Einstein Search: Personalization (Generally Available), Easier Setup at the Org Level, Improved Natural Language Search (Beta)

Updated the Beta disclaimer.

Metadata API

Added information about using the new filterLogic field on the FlowRecordDelete, FlowRecordLookup, FlowRecordUpdate, FlowStart, and FlowDynamicChoiceSet subtypes of the Flow metadata type. This new field provides methods to filter Flow query results using conditional filter logic.

Added information about the new apiVersion field on the Flow metadata type.

Added information about the new enforceUserDeviceRevoked field on the SessionSettings subtype of the SecuritySettings metadata type.

Added information about the new doesRequireRecordChangedToMeetCriteria field on the FlowRule subtype of the Flow metadata type.

Added information about the new canDebugFlowAsAnotherUser field on the FlowSettings metadata type.

New and Changed Objects

Added information about the new ApiVersion and ApiVersionRuntime fields on the FlowVersionView object.

Tooling API New and Changed Objects

Added information about the new ApiVersion field on the Flow object.

Configure Custom Flow Screen Components More Easily (Generally Available)

Added the Why section to the release note.

Create Custom Property Editors for Lightning Web Components (Generally Available)

Added a release note to announce the support for custom property editors for Lightning web components is generally available.

Bulk API 2.0

Added information about the order of the columns returned by a Bulk API 2.0 guery.

Help Sales Reps Sell More with Product Recommendations in the Quote Line Editor

Clarified that the plugin pulls the product recommendations from a customer-implemented recommendations engine.

Removed: AiVisitSummary from Consumer Goods Cloud Has New Objects on page 287

This object isn't ready for showtime, so we're making some improvements. We'll let you know when it's ready.

Improve Performance With Record-Triggered Flows That Run Only for Specific Changes

Updated the release note, formerly titled "Improve the Performance and Precision of Record-Triggered Flows with Entry Criteria," to add details and elaborate on the new options.

Einstein Prediction Builder: Become an Expert on Your Prediction Results in an Action-Packed Scorecard

Added a release note for the new, information-packed Einstein Prediction Builder scorecard.

Einstein Prediction Builder: Test Your Prediction's Performance Interactively

Added a release note for the Distribution of Results graph in Einstein Prediction Builder.

Get to the Point with Report Highlights

Report Highlights is coming to the Salesforce mobile app for Android, too! Updated the release note and added an image.

September 16, 2020

You Asked for It!

Added Ideas that we delivered.

See Total Replies and Link Clicks in Reports

Added release note about new fields on High Velocity Sales reports.

No Longer Testing Lightning Community Features on Internet Explorer 11

Added release note about ending Community Cloud support for Internet Explorer 11.

Keep Working with Tab-Focused Dialogs (Update, Postponed)

Changed the auto-enforcement date to Winter '22.

Take a Flow Path Only When Certain Record Changes are Made

Updated the release note, formerly titled "Create Decision Outcomes that Only Execute When Certain Changes are Made," to add details and explain how this option evaluates records.

Metadata API

Added information about the new doesRequireRecordChangedToMeetCriteria field on the FlowRule subtype of the Flow metadata type.

Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App

Updated the release note to add details on use cases for the Analytics for Mortgage app.

Predict Outcomes in Process Automation Formulas

Add Einstein Discovery PREDICT function used to get predictions in process automation formulas.

Interactively Create Engaging Email Templates

Removed Essentials from the list of editions.

Debug Flow Errors in Sandbox Org as Another User

Added information about required permissions and how to use the feature.

September 11, 2020

Winter '21 Upgrade Prerequisites

Added a release note to specify new compatibility requirements in Health Cloud for release Winter '21.

Emergency Response Management for Public Health

Added a release note to specify new compatibility requirements in Emergency Response Management for Public Health for release Winter '21.

September 9, 2020

Shared Folder Support in the Outlook Integration

Updated release note to indicate that shared mailbox support is available after all Salesforce production orgs have received the Winter '21 release.

Removed: Block Activity from Automated Emails with Einstein Activity Capture

This feature isn't ready for showtime, so we're making some improvements before we release it. We'll let you know when it's ready.

Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App, Predict Client Churn Risk for Wealth Management, and Predict the Likelihood to Add Assets for Wealth Management

Updated release notes with add-on license information.

Customize Healthcare Apps for Use Cases with Einstein Analytics for Healthcare Enhancements

Added release note about Analytics for Healthcare enhancements.

Enforce Data Access in Flow Merge Fields (Update, Postponed)

Updated the release update to clarify that it affects merge fields on related records.

CPQ and Advanced Approvals Transition to Permission Set Licenses Is Complete

Added a release note stating that permission set licenses have replaced managed package licenses.

Download the Einstein Vision and Language OpenAPI Spec

Added release note to announce the availability of the OpenAPI spec.

Metadata API

Added information about the new isViewedAsPlainText field on the FlowTextTemplate subtype of the Flow metadata type.

Added details about where you might encounter issues in your automated UI tests.

Enable Dependency Access Checks In Lightning Components (Update, Retired)

This update has been retired and no longer requires any action.

Create Orders Without Opportunities

Added a release note about creating orders without opportunities in Salesforce CPQ+.

Monitor Event Publishing and Delivery Usage

Clarified information about the storage of platform event usage metrics.

Removed: Tap Into Salesforce from Your Home Screen with the Quick Navigation Widget

Widgets aren't ready for showtime, so we're making some improvements before we release this feature.

Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Previously Released Update)

Added a new Release Update to allow users to use standard external profiles to self-register and log into communities.

Trigger a Flow to Run Before a Record Is Deleted

Added more information about who can run the flow, why they run the flow, and how to run the flow.

Text Template Setting Is Saved

Added more information about why the text template setting is now saved in the Text Template flow resource.

BEM Notation with Double Dashes Is Being Deprecated

Updated release note to indicate that the feature will be deprecated in Summer '21 instead of Spring '21.

Customize Data Access for Sales Managers

Updated the screenshot.

September 2, 2020

Choose When to Show the Submit for Approval Action (Generally Available and Beta), Easily Add Actions to Flows from Public Web Services (Pilot), Create Event-Driven Recommendations Using Voice Call Records, and Add Al-Driven Recommendations to Your Strategies Using Einstein Recommendation Builder (Beta)

Corrected edition information.

New and Changed Objects

Added descriptions for new objects (ReturnOrderItemAdjustment and ReturnOrderItemTax) and updated objects (OrderSummary, ReturnOrder, and ReturnOrderLineItem) to the Commerce section.

New and Changed Standard Platform Events

Added a description for the new ProcessExceptionEvent object to the Commerce section.

Manually Log Emails from the Outlook Integration When Einstein Activity Capture Is On

Clarified that manual email logging when Einstein Activity Capture is on applies to users who don't use Salesforce Inbox.

Email Tracking Location Information Removed from the Outlook Integration with Inbox

Added release note about the removal of location information when tracking emails in the Outlook integration with Inbox.

Manually Log Emails from the Gmail Integration When Einstein Activity Capture Is On

Clarified that manual email logging when Einstein Activity Capture is on applies to users who don't use Salesforce Inbox.

Email Tracking Location Information Removed from the Gmail Integration with Inbox

Added release note about the removal of location information when tracking emails in the Gmail integration with Inbox.

Salesforce for Outlook Retirement Rescheduled

Added the specific retirement date for Salesforce for Outlook: December 31, 2020.

Removed: Do More with Opportunity Products

We removed lookup relationships between OpportunityLineItem and other objects while we make some changes to this feature.

Platform Development Tools

Added information about installing the pre-release version of the salesforcedx plug-in.

Orders: New Behavior for Saving Orders (Update)

Added a note that the New Order Save Behavior release update isn't supported in CPQ and Billing.

Salesforce CPQ and Billing: Dynamic Quote Fields, Asset Lifecycle Management, and Standalone Orders

Added a note that the New Order Save Behavior isn't supported in CPQ and Billing.

Apex

 $\label{thm:eq:added} Added the new \verb|getCaseIdFromEmailHeaders()| method and deprecated the \verb|getCaseIdFromEmailThreadId()| from the System Namespace.$

New and Changed Objects

Removed the AppAnalyticsQueryRequest object field HeaderFields.

New and Changed Modules for Lightning Web Components

Added the new lightning/uiAppsApi wire adapter module.

User Interface API

Added the new navItemNames parameter for the /ui-api/nav-items resource.

Improve Account Forecasting by Using Opportunity Product Schedules (Pilot)

Added a note about using opportunity product schedule values for account forecasting in the Manufacturing Cloud release notes.

August 24, 2020

Salesforce Winter '21 Release Notes

Published preview release notes.

Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

- **Trailblazer Community**—Post your feedback in the Release Readiness Trailblazers group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Winter20Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback form and vote up or down. Add comments if you have them.
- **Twitter**—When you follow @salesforcedocs on Twitter, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Tweet us at @salesforcedocs.

Get Ready for the Release

Reading the release notes is a great step in preparing for the release. These other resources help get you, your org, and your users ready for what's coming your way. We add resources throughout the release when they become available, so check back often.

What's New This Release

- Release Overview Deck (ROD). Create internal training for your users, review setup screens, and learn how to use features.
- Release Matrix. Quickly see which features immediately affect your users.
- Winter '21 Pre-release Signup. Sign up for a pre-release org to get early access to the new features.
- Release Readiness Live. Register and make the most of the new features.
- Release Demos. Get quick video overviews of what's coming this release.
- Winter '21 Release Website. Check out the new features.
- Winter '21 Release Highlights Module. Get the Spring '19 Trailhead badge.
- Release in a Box. Use this kit to prepare and present the new release to your org and users.

Release Readiness Essentials

- Release Readiness Trailblazers. Access resources and experts for all things release readiness.
- Release Milestones. See key dates for the release.
- Trust Status Maintenances. See sandbox and other release dates and times. Click Instances and your instance to see your maintenance dates.
- Sandbox Refresh Calculator. Plan if and when you need to refresh your existing sandbox orgs.
- Sandbox Preview Video. Learn how to navigate the sandbox preview process.
- Sandbox Preview Instructions. Get early access to new features in your sandbox.
- Customer Success Event Calendar. Register for release overview webinars and access recordings.
- Certification Release Maintenance Schedule. Keep your certification updated in Trailhead.
- Prepare for Salesforce Releases. Use Trailhead to create your release strategy.
- Releases Email Journey. Prepare for releases by subscribing to emails.

How and When Do Features Become Available?

Some features in Winter '21 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

We made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
End of Support for Internet Explorer 11 in Lightning Experience	✓			
Supported Browsers and Devices for Lightning Experience	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers and Devices for Salesforce Classic	✓			
Supported Browsers for Einstein Analytics	~			

Salesforce Overall

Starting Wednesday, November 4, 2020, find the Salesforce Release Notes on Salesforce Help, the same place you go for help as well as the release notes for Commerce Cloud, Marketing Cloud, and Customer 360. Use the Multi-Factor Authentication (MFA) Assistant to help roll MFA out to your users. Get personalized search results based on your activity, location, and other factors, with Einstein Search. Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and Lightning Flow invocable actions (Beta). Also, read through our Customer 360 guides and solution kits to help solve complex business cases, add custom themes to in-app guidance, display specific survey pages to participants based on data, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help			~	
Download Release Notes PDFs for Salesforce Releases Before Winter '16			~	
Multi-F	actor Authentication	: Safeguard Account	Access	
Drive Your Multi-Factor Authentication Implementation from One Place			~	
Renamed Two-Factor Authentication User Permissions and Labels in Setup			~	
	Sea	rch		
Einstein Search: Personalization (Gener (Beta)	ally Available), Easier	Setup at the Org Le	vel, Improved Natur	al Language Search
Enable Personalization to Tailor Search Results to Each User (Generally Available)			~	
Step Up Productivity with Einstein Search in Professional Edition	▽			
Click Three Times to Enable Einstein Search for Your Org			~	
Benefit from Smarter Natural Language Search Results (Beta)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Rename It—Einstein Search Finds It (Beta)			~	
Benefit from Al-Powered Einstein Search in Government Cloud				
Get Search Results for Newly Searchable Objects		~		
Get Better Search Results for the Name Field in Asian Languages				
Salesforce Anywhere: Plan and Accelerate Your Business in Real Time (Beta)			✓	
Cross-Clou	ud Integrations: Custo	omer 360 Guides, Sol	ution Kits	
Introducing Customer 360 Guides				
Transform the Consumer Experience			~	
Lightning Exp	erience Engagement	: In-App Guidance a	nd Help Menu	
Add In-App Guidance to New, Edit, and Clone Pages			~	
Add Custom Theme Colors to In-App Guidance			~	
Share a Direct Link to In-App Guidance			~	
Search Trailhead from the Help Menu			~	
Add More Custom Resources to the Help Menu			~	
Learn About Salesforce In-App Content		~		
Salesforce Surveys: E	nhanced Participant	Experience, Survey 1	emplates, and More	1
Display Survey Pages Based on Your Data	~			
Personalize Survey Questions Within Email	~			
Email Survey Invitations to 300 Participants		~		
Give Your Colleagues a Head Start with Template Surveys	~			
Move Questions Around on a Page	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Retain Translations from a Copied Survey	~			
Improve Participants' Experience when Responding in Right to Left Languages	~			
Respect Email Opt Out Preferences	~			
Consider Your Org's Email Limits			~	
Single Selection Question Look and Feel Was Changed	~			
Lightning Scheduler: Controlled and D	irect Interaction with Flexibility,		Embedded Flows, G	ireater Scheduling
Write Lightning Scheduler Appointments Directly to External Calendars			<u>~</u>	
Check Resource Availability Directly from External Calendars			~	
Schedule Appointments in a Whole New Way			~	
Use Custom Scheduling Policies with Lightning Scheduler Flows			✓	
Run Lightning Scheduler Flows Without Worrying About User Permissions			~	
Manage Customer Flow			~	
Other Changes to Lightning Scheduler			~	
Prepare for the Microsoft Edge Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations	~			
Prepare for Firefox Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations	~			
Do More with the Optimizer App			~	
See More Record Info in Highlights Panels	~			
UI Changes for Lightning Web Components	~			
UI Changes for Cloning Records	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Recycle Bin Search Capability Is Being Removed	~			
Access Setup and Visualforce Pages in Apple® Safari		~		
Cisco Webex Is Being Retired	✓			
Skype Is Being Retired	~			
Keep Working with Tab-Focused Dialogs (Update, Postponed)			~	
Reopen Business Transparently with Digital Trust Cards				

Service

Get started with Service Cloud Voice using a streamlined setup, support for Sales Cloud, the Voice API Toolkit (generally available), and more. Let Omni-Channel supervisors view calls as they happen to improve training and onboarding. Build your Einstein Bot faster with a new guided template and strengthen intent models with Input Recommender (beta). Field Service Time Sheets let you track your employees' hours right inside your field service solution. Accelerate your customer service configuration with easy setup and built-in best practices. Learn about these and other new Service Cloud features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Einstein fo	or Service		
Einstein Bots				
Jumpstart Bot Building with Bots Guided Setup Updates	▽			
Strengthen Your Intent Model with Input Recommender (Beta)	~			
Make Bot Development a Team Effort with Enhanced Permissions	~			
Find Your Way with New Map View Accessibility Features (Generally Available)	~			
Get Even More Languages for Einstein Bots	~			
Get Specific with Custom Context Variables Mapping	✓			
Gain Deeper Insights with Enhanced Bot Session Metrics	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Bots: Session Timeout Updates	✓			
Routing Was Updated for Einstein Bots	✓			
Bot Options Menu Behavior Was Changed	~			
Einstein Case Classification				
Try Einstein, Now with Faster Recommendations (available within 24 hours after the release)	<u>~</u>			
Controlling Fields Are Optional		~		
Get Insight into Auto-Update Issues		~		
Learn More with Prediction Fields in Einstein Case Classification	~			
Einstein Reply Recommendations				
Keep the Conversation Going with the New Docked Format	~			
Expand Your Global Reach with Reply Recommendations in Eight Languages (Pilot)				▽
Einstein Article Recommendations				
Show Einstein Article Recommendations to Lightning Knowledge Users (Update)	~			
Find and Fix Data Flaws Earlier			~	
	Field S	ervice		
Field Service Has a New Name	~			
Keep Track of Time on the Job with Time Sheets (Generally Available)		~		
Record Product Warranties			~	
Improve Preventive Maintenance with Advanced Recurrence (Beta)				~
Get the Total Price on Service Contract Line Items			~	
Find the Right Previous Business Day with BusinessHours.add			~	
Get Translated Work Order Subjects			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Field Service Scheduling				
Estimate Travel Times with Street-Level Routing (Generally Available)		~		
Target Work Priorities Using Service Appointments		~		
Shape Up with New Tests in Health Check		~		
Offload Sandbox Services for Routing and Optimization		~		
Field Service Mobile App				
Send Meaningful Messages Using Custom Notifications		~		
Log Work Hours with Time Sheets (Generally Available)	~			
Never Miss a Message in Notifications	~			
Be More Efficient with the Actions Launcher Redesign	<u>~</u>			
Service Setup	~			
	Chan	inels		
Voice: Now Available in Sales Cloud, API	Toolkit, Process Auto	mation Tools, and Co	llaboration and Usal	pility Improvements
Amp Up Sales Cloud with Voice			~	
Spend Less Time Setting Up Voice with Improved Setup			~	
Recommend the Next Best Action for Agents with the Service Cloud Voice Toolkit API (Generally Available)			~	
Kick Off Lightning Flows, Processes, and Workflows Based on Voice Call Records			~	
Work More Efficiently on Voice Call Records with Macros and Quick Actions			~	
Let Agents Pause and Resume Call Recordings			~	
Listen to Call Recordings on the Improved Call Recording Player			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Transfer Callers to the Right Agent with a More Intuitive User Interface	~			
Dial Phone Extensions with the Built-In Keypad	~			
Collaborate Better with Chatter on Voice Call Records			~	
Get Warnings to Avoid Ending Calls Accidentally			~	
Facilitate Training with Service Cloud Voice Transcript Monitoring			~	
Track Amazon Connect Charges in Standard Reports			~	
Add Voice Call Custom Fields to Packages			~	
Stay Secure with the Revised Telephony Integration REST API			~	
Messaging				
Create Messaging Templates Using Leads and Opportunities			~	
Specify Permissions for Messaging Session Objects			~	
Omni-Channel Routing Types Renamed		~		
Use Skills-Based Routing Rules to Direct Messages to the Right Agents			~	
Send One-to-Many Messages with Broadcast Messaging			~	
Chat				
Omni-Channel Routing Types Renamed		~		
Use Skills-Based Routing Rules to Direct Chats to the Right Agents			~	
Embedded Service for Web				
Reimagine Customer Interactions with Channel Menu Code Settings			~	
Customize Communities with Code Settings			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Chat Conversations with a New Message Icon		~		
Streamline Bot Responses for Screen Readers	~			
	Knowl	ledge		
Enhancements to Sharing for Lightning	Knowledge (General	ly Available)		
Use Knowledge Sharing with Guest Users and High-Volume Community Users			~	
Transfer Ownership of Published and Archived Articles			~	
Perform Mass Ownership Changes on Draft Articles			~	
Track Article Ownership Changes		~		
Knowledge Enhancements for Channels		~		
Changed Permissions for Linked Articles		~		
	Rout	ting		
Attribute Setup for Skills-Based Routing Was Renamed		~		
Use Omni-Channel Skills-Based Routing Rules to Route Chats and Messages to Agents with the Right Skills			~	
Routing Types for Chat and Messaging Were Renamed		~		
Transfer Chats to Other Agents, Queues, and Skills		~		
Show Supervisors Only the Agents on Their Teams (Generally Available)			~	
Monitor Service Cloud Voice Transcripts in Omni-Channel Supervisor			~	
	Case Man	agement		
Enhance Security with a New Threading Behavior for Email-To-Case			~	
Improve Agent Interactions with Prebuilt Flows	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Boost Agent Productivity with Prebuilt Macros	▽			
Streamline Customer Interactions with Prebuilt QuickTexts	~			
Service Setup Assistant: Go from Zero to Console in Minutes	~			
	Other C	hanges		
Microsoft Teams Integration (Pilot)			✓	
Service Console: Avoid Duplicating Existing Records				

Sales

Organize and share sales cadences in folders, pause sales cadences, and change step ownership. Use Einstein Lead Scoring even when you don't have enough data of your own. Use opportunity deal change highlights to see what's changed in the pipeline. Create invoices and bills for orders that originate from B2B Commerce, Service Cloud, and other systems. Plus, Call Coaching users can share voice calls. Get more out of Einstein Activity Capture with new connection and configuration options. And sales reps get even more productive with emails and templates.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	High Velo	city Sales		
Einstein Call Coaching				
See Insights Related to Challenges and Trending Terms			~	
Share Voice Calls			~	
Do More with Call Coaching Dashboards			~	
Use More Call Player Features			~	
Access Chatter from Voice Call Records			✓	
Receive More Info in the Call Highlights Email			~	
See More Setup Information			~	
Control Who Can Access Sales Cadences	S		~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Hand Off Sales Cadence Targets to Another Rep	✓			
Pause Sales Cadence Targets	~			
Filter Your Work Queue by Target Status	~			
Stay Organized with a More Structured Work Queue	~			
Stay Focused with Session-Long Work Queue Filters	~			
Choose Which Number to Dial for Click-to-Call	<u>~</u>			
Other Changes to High Velocity Sales				
Daily Per-User Limit for Automated Email Was Introduced		~		
Limit on Sales Cadence Active Targets Was Introduced		~		
See How Many Targets Were Paused on Each Sales Step	~			
See Total Replies and Link Clicks in Reports	~			
	Salesfor	ce Maps		
Salesforce Maps				
Plan Customer Visits Safely			~	
Get There with Uber			~	
Extend Salesforce Maps with Lightning Components and Flows			~	
Plot Shape Layers That Match Territory Planning Alignments			~	
Report On Route Travel Times and Distances			~	
Map Multiple Records from Lightning Experience			~	
Map New Shape Layers			~	
Other Enhancements in Salesforce Maps			~	
Salesforce Maps Territory Planning				
Compare Alignments			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update Salesforce Fields with Territory Planning Data			~	
Create Data Sets for Multiple Countries and Regions			~	
Access and Restore Alignment Data			~	
Plan Territories for Field Service			~	
Aggregate Records for Big Data Sets			~	
Discover New Containers			~	
Other Enhancements in Salesforce Maps Territory Planning			~	
Salesforce Maps Advanced				
Create Data Layers from Outside Data Sources			~	
Assign Routes to Members of Account Teams			~	
Define Visit Windows for Your Reps			~	
	Sales Clou	d Einstein		
Optimize the Opportunity Scoring Model			~	
Enable Einstein Lead Scoring with Less Data			~	
See Key Factors with Renamed Opportunity Field Labels	~			
Additional Users Permission for Setting Up Opportunity and Lead Scoring		~		
Take It to the Next Level with Einstein Activity Capture			~	
	Core Sales	Features		
Opportunities				
Find Changed Deals at a Glance	~			
Enjoy Improvements to Einstein Opportunity Scoring			~	
Collaborative Forecasts				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Forecasts on the Go	✓			
Update Opportunity Stages on the Forecasts Page in Lightning Experience	~			
Enterprise Territory Management	~			
Orders	~			
Other Changes in Core Sales Features				
PK Chunking Support Added for ObjectTerritory2Association		~		
Original Territory Management Is Being Retired		~		
	Productivit	y Features		
Einstein Activity Capture				
Connect Microsoft Office 365 to Salesforce in More Ways			~	
Control How Data Flows Between Salesforce and the Connected Account			~	
Know When a Prospect or Contact Has a Request for You with Email Insight	~			
Prevent New Users from Changing the Default Sharing Setting			~	
Add Users to a Configuration More Easily		~		
Keep Settings and Configurations When You Turn Off Einstein Activity Capture		~		
Enjoy Enhancements to the Activities Dashboard	~			
Avoid Cluttering the Activity Timeline with Internal Activity		~		
Email Experience				
Easily Coordinate When to Meet with Insert Availability in Lightning Experience	~			
Send List Emails at the Ideal Time	✓			
Create Larger Emails with New Maximum Size of 35 MB	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Default Email Encoding Changing to UTF-8	~			
Streamline Contacts and Leads with Default Bounce Alerts	~			
Email Templates				
Interactively Create Engaging Email Templates			~	
Salesforce Inbox Mobile	~			
WDC				
Legacy Work.com Is Now WDC			~	
	Integration v	with Google		
Gmail [™] Integration				
Manually Log Emails When Einstein Activity Capture Is On			~	
Insert Availability Improvements	~			
Email Tracking Location Information Removed from the Gmail Integration with Inbox	✓			
Lightning Sync for Google			~	
	Integration wi	th Microsoft [®]		
Teams Integration (Pilot)			~	
Outlook [®] Integration				
Continued Support for the Outlook Integration in Older Versions of Outlook and Windows			~	
Manually Log Emails When Einstein Activity Capture Is On			~	
Shared Folder Support	~			
Insert Availability Improvements	~			
Email Tracking Location Information Removed from the Outlook Integration with Inbox	~			
Lightning Sync for Microsoft® Exchange				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Sync Not Available for New Salesforce Customers			~	
Required Setting Changes for Some Microsoft Office 365 Customers			~	
Salesforce for Outlook				
Salesforce for Outlook Retirement Rescheduled			~	
Restore Access If Service Is Interrupted			~	
Find Version-Specific Salesforce for Outlook Release Notes			~	
	Salesforce CP	Q and Billing		
Salesforce CPQ				
Dynamically Control Quote Fields Shown in the Quote Line Editor			~	
Create Orders Without Opportunities	~			
Sell Add-On Products on Amendments and Prevent Backdated Amendments at the Same Time	~			
Connect CPQ to B2B Commerce with Solution Kits			~	
Help Sales Reps Sell More with Product Recommendations in the Quote Line Editor			~	
Protect Your Data with Salesforce Shield			~	
Validation Was Added to Ensure Unique Values for Number Field on Quote Lines	~			
Permissions for Activating Order Products in Orgs with Usage-Based Pricing Were Changed			~	
CPQ and Advanced Approvals Transition to Permission Set Licenses Is Complete	~			
Salesforce Billing				
Understand What Your Customers Have Bought				~
Create Orders and Order Products Without CPQ Quotes	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Gather Information About Financial Actions on Salesforce Billing Objects	~			
Align Cancellation and Amendment Calculations Based on Billing Periods	~			
Demonstrate Salesforce Billing Payment Functionality with Test Gateway Adapters	~			
Capture Externally Authorized Payments in Salesforce Billing	~			
Billing Period Creation Logic Was Updated	~			
	Other Changes in	the Sales Cloud		
Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)			~	

Industries

Our industry-specific solutions work even harder in Winter '21 to bring you closer to your customers. Health Cloud brings you streamlined document management for patient intake, along with new inventory management and sales forecasting capabilities. Financial Services Cloud unveils a new community portal template, compliant data sharing, and improved record rollups. Consumer Goods Cloud helps you plan store visits and keep shelves stocked, and Manufacturing Cloud gives you finer control over rebates and account forecasts. Our new data processing engine works behind the scenes to help you leverage your Salesforce data for bigger business impact. On top of all that, meet the newest addition to our lineup of industry-specific solutions: Public Sector Foundation, with advanced support for government service providers and users!

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Health	Cloud		
Winter '21 Upgrade Prerequisites		~		
Intelligent Document Automation: St	treamline Intake for Pat	ient Services and Su	pport	
Process Intake Documents Better				~
Get a Handle on Referrals				~
Encrypt Data in Intake Documents			~	
Intelligent Sales: Field Inventory Man	nagement on Mobile, Pr	oduct Serialization, a	and More	
Manage Your Inventory on the Go		~		
Track Products Using Serial Numbers		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Serial Numbers in Orders Authorized in a Visit			~	
Stay On Top of Transfer Requests with Chatter Post Notifications		~		
Other Changes in Intelligent Sales			~	
Customize Healthcare Apps for Use Cases with Einstein Analytics for Healthcare Enhancements				~
Health Cloud Has New and Changed Objects		~		
Health Cloud Has New App Builder Components		~		
	Financial Ser	rvices Cloud		
Mortgage for Financial Services Cloud:	Enhanced Customer E	experience with Pre-	Built Community an	d New Flow
Use a Financial Services Community to Speed Loan Processing and Empower Loan Officers		✓		
New Financial Services Cloud Flow and Flow Screen Components				
Use New Summary View Lightning App Builder Component				
Get Notifications of Changes to Mortgage Object Records				
Create or Update Loan Applications and Upsert Records from a Single Endpoint		~		
Create a Loan Forbearance Solution				
Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App			~	
Insurance for Financial Services Cloud: C for Account Relationships	onsolidated View of H	ousehold Policies, Re	ecord Type Filter on P	olicies, and Suppo
Policy Component: Household Policies, Record Type Filters, and More			~	
Simplify Partner Access to Insurance Records with Account Relationships			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Print Insurance Record Details with Printable View			~	
Analytics for Insurance: Predictive App Template, Date Filtering, and Data Access for Sales Managers				
Wealth Management for Financial Servi	ces Cloud: New Predi	ction Capabilities		
Predict Client Churn Risk for Wealth Management			~	
Predict the Likelihood to Add Assets for Wealth Management			~	
Compliant Data Sharing: Advanced Data Sharing Configuration to Improve Compliance (GA)	~			
Actionable Relationship Center: Manage Complex Relationships and Related Lists	~			
Stay Productive with Financial Services Cloud Lightning Components for Mobile	~			
Record Rollups for Financial Services Clo	oud			
Gain Visibility into Household Cases with Case Record Rollups			~	
Optimize Record Rollups			~	
Get Improved Performance and Granular Control Over Batch Record Rollups			~	
Speed up Interaction Date Calculations			~	
Encrypt Identity Document Fields			~	
New and Changed Financial Services Cloud Object Fields		~		
New and Changed Financial Services Cloud Metadata Types		~		
REST API		~		
Public Sector Solutions: Licensing and Pe	rmitting Managemen	t Made Simpler, Fast	er, and Transparent (Generally Available
Transform Government Services with Public Sector Solutions			~	
Define Diverse Authorization Processes with Easily Configurable Data Model			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give a Consolidated View of Applications with the Hierarchical View Component			<u>~</u>	
Plan Effective Inspections with the Inspection Management Mobile App			~	
Create a Feature-Rich Portal for Constituents' Licensing and Permitting Needs			✓	
Help Constituents Plan and Prioritize Applications			~	
Accommodate Diverse Licensing and Permitting Needs with Dynamic Forms			~	
Issue Licenses and Permits Faster with Automated Approval Processes			~	
Track Code Violations and Enforce Compliance to Regulatory Standards			~	
Public Sector Solutions Have New Objects		~		
Public Sector Solutions Have New Metadata Type		~		
Consumer Goods Cl	oud: Direct Store Deli	very, Visit Recomme	ndations, and More	
Einstein Visit Recommendations: Plan Visits to the Right Stores at the Right Time			✓	
Ensure Timely Deliveries to Stores with Delivery Tasks			~	
Visit Execution: More Flexibility and Imp	proved Productivity			
Create Custom Tasks Based on Standard Consumer Goods Objects			~	
Filter and Sort Your Visits			~	
Other Changes to Consumer Goods Cloud	~			
Enhance Your Stores' Retail Execution	~			
Consumer Goods Cloud Has New Objects		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manufacturing	Cloud: Rebates (Pilot)	and Enhanced Acco	unt Forecasting	
Rebate Management: One-Stop Solution	n for Processing Reba	tes (Pilot)		
Define Rebate Programs to Easily Calculate Rebate Amounts (Pilot)			~	
Process Rebate Payouts (Pilot)			~	
Keep Your Partners Informed on Rebates Through Communities (Pilot)			~	
Renew Sales Agreements and Calculate	Account Forecasts wi	ith Greater Flexibility	y	
Be Future Ready by Defining the Start of Sales Agreement Renewal Periods			~	
Calculate Account Forecasts with Better Precision by Specifying Sales Agreements			~	
Use Opportunity Probability in Account Forecasting			~	
Improve Account Forecasting by Using Opportunity Product Schedules (Pilot)			~	
Use Manufacturing Partner Community Template with Lightning External Apps Licenses			~	
Einstein Analytics for Manufacturing: To	arget Analysis and Da	ta Access Control for	Managers	
Track Your Sales Performance Against Targets	~			
Customize Data Access for Sales Managers		~		
Changed Manufacturing Cloud Metadata Types		~		
Changed Manufacturing Cloud Tooling API Objects		~		
Batch Managemen	t: Processing Large Vo	olumes of Data with	a Few Clicks (Pilot)	
Define Batch Jobs to Process Large Record Volumes (Pilot)				<u>~</u>
Schedule Your Batch Jobs (Pilot)				~
Keep a Close Eye on Your Batch Jobs (Pilot)				~
Data Processing En	gine: Transform Data	in Your Org in a Who	ole New Way (Pilot)	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Transform Data with a Few Clicks (Pilot)			~
Run Your Data Processing Engine (Pilot)			~
Track What Your Data Processing				~
Engines Are Up To (Pilot)				
Eme	rgency Response Man	agement for Public H	lealth	
Winter '21 Upgrade Prerequisites		~		
Introducing Vaccine Management			~	

Analytics

Analytics includes Reports & Dashboards, Einstein Analytics, and Einstein Discovery. Get Einstein Discovery going more quickly and easily with Fast Start Templates. Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. Automate some of the manual steps required to update your Einstein Discovery predictive models with scheduled model refresh.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Introducing Our New Name for Einstein Analytics: Tableau CRM		~		
	Reports and	Dashboards		
Subscribe to Get Report Results Delivered by Email (Generally Available)			~	
Auto Add Fields to Custom Report Types (Beta)			~	
Enable Enhanced Folder Sharing (Update)			~	
	Einstein /	Analytics		
Setup and Data Integration				
Avoid Stale Salesforce Data in Snowflake with Sync Out (Beta)				~
Write Your Einstein Analytics Datasets to Snowflake from Recipes (Generally Available)	<u>~</u>			
Prepare Data with the Next Generation of Data Prep (Generally Available)	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Calculated Formula Columns with More Functions in Data Prep	<u>~</u>			
Calculate Dates with Click-Not-Code Date and Time Transformations	~			
Quickly Calculate Statistics with Aggregate Functions	~			
View More Previews in Recipes	~			
Manage Row-Level Security for Data Prep Recipes	~			
Edit a Dataset with One Click from Data Manager	~			
Monitor and Update Auto-Installed Analytics Apps from Setup		~		
Prebuilt Templates and Apps				
Improve Insights into Sales Performance with the Revenue Operations Analytics App		~		
App Building				
Freeze Some Table Columns, Scroll Through the Rest	~			
Expand or Collapse Grouped Columns Faster	~			
Customize One-Click Actions for Dimensions			~	
Gain Insights on Data Directly in Snowflake (Generally Available)	~			
Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Beta)				✓
Emphasize Key Metrics in Dashboard Text with Conditional Formatting	<u>~</u>			
Protect Data in Embedded Dashboards with Locked or Hidden Filters		~		
Save Time Creating and Managing Dashboards with Reusable Dashboard Components (Pilot)				✓
Add Faceting to More Data in Dashboards	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Develop Analytics Templates for Auto Installation		~		
View Einstein Analytics Data Downloads in Your Event Log Files		~		
Einstein Discovery				
Guide User Actions with Custom Improvement Text				~
Predict Outcomes in Process Automation Formulas				✓
Enable High Cardinality for One Variable in a Story				~
Visually Determine Whether Your Data Is Normally Distributed				~
Update Your Models Regularly with Automatic Refresh				~
Stay Informed with Dataset Change Notifications and Applied Filters				~
Embed Predictions in Your Dataset During Data Prep (Pilot)				~
Minimize Disparate Impact in Your Stories with Sensitive Variables				~
Jump-Start Story Creation Using Templates				~
Get Better Tuned XGBoost and GBM Models				~
Implement External Models in Your Salesforce Org (Pilot)				~
Build Accurate Models Using Random Forest Algorithms (Pilot)		~		
Annotate Story Versions with Descriptions				~
Cancel Story Creation During Analysis				~
Load Einstein Discovery Stories Faster				~
Focus Your Predictions in Einstein Prediction Service				~
Analytics for Everyone				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Monitor Important Metrics with the Einstein Analytics Watchlist (Generally Available)	▽			
Subscribe to Lenses and Dashboard Widgets for Timely Email Updates (Generally Available)			V	
Control Who Shares Dashboard and Lens Images			~	
Mobile Apps	~			
What's New In SAQL				
Get Custom Fiscal Year Support in Einstein Analytics (Generally Available)				~
Convert Multi-Value Fields to String Fields in SAQL (Beta)		~		
Write Local Time Zone-Specific Queries with Single Custom Time Zone (Beta)				~
Use Trigonometry and ASCII Conversion Functions in SAQL Queries				
Access Date Information With More Functions for Fiscal Year Data		~		

Commerce

Check out what's new in Salesforce Order Management and Lightning B2B Commerce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Salesforce Orde	er Management		
Manage Process Exceptions		~		
Manage Return Merchandise Authorizations	~			
Access New and Updated Order Management Flows		~		
Create Order Summaries with Custom Numbers and Statuses		~		
Handle Custom Payment Methods		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable		
Lightning B2B Commerce						
Let External Users Buy for or Manage Users on External Managed Accounts	~					
Use Improved Order Summary Components		~				
Provide Accurate Checkout Information with Time to Live		₹				
Connect Faster with the B2B Commerce Integration Dashboard		~				
Present Your Delivery Options with the Delivery Method Component		~				
Give Buyers Clear Information About Volume Discounts		~				
Manage Your B2B Commerce Pricing in the Pricing Workspace		~				
See All Your Products in One Place and Take Action on Them	~					
View Associated Stores and Manage Searchability on Products	✓					
Associate Your Buyer Groups to Stores to See Pricing and Entitlements		~				
Bookmark Store Search Results	~					
Get an Effortless No-Search-Results Experience		~				
Show or Hide Breadcrumbs in Product Search Results	~					
Add All Cart Items, Rename, and Delete Lists (Beta)				✓		
Dismiss Cart Errors for Good	~					

Communities

Our elves have been hard at work this release delivering new features and enhancements. We're revamping our image and introducing our new name: Experience Cloud. Take advantage of more granular audience criteria that let you vary record detail pages based on record fields. The latest Build Your Own (LWC) template is packed with changes, including support for an upgraded version of Lightning

Locker, custom URL paths, and SEO. And your data is more secure than ever with the enforcement of several guest user security settings that were introduced in previous releases.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Move Over Community Cloud, There's a New Kid in Town: Introducing Experience Cloud			<u>~</u>	
	Lightning Co	ommunities		
Prepare Your Community for Upcoming CSP Changes		~		
Manage Your Pages and URLs with the Pages Menu		~		
Apply Audiences to Record Detail Pages with Record-Based Criteria		~		
Print Lightning Community Record Details and Lists with Printable View		~		
Package Tile Menus in Bolt Solutions		~		
Let External Users Manage Other Users with External Managed Accounts			~	
Topic ID Field Added Back to Topics Components		~		
	Developer P	roductivity		
Build Fast, Efficient Experiences with the LWC-Based Template (Pilot)			~	
Communities Now Support lightning:hasPageReference and Default Field Values in lightning:navigation		✓		
	Guest	User		
Secure Guest User Record Access Can't Be Disabled (available within 24 hours after the release)		✓		
Automatically Assign Records Created by Guest Users to a Default Owner (Previously Released Update)			▼	
Reduce Object Permissions for Guest Users		▽		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Opt Out of Enforcing Guest User Object Permission Changes (Previously Released Update)			<u>~</u>	
View All Users and Other Permissions Removed in Guest User Profiles (Previously Released Update, Enforced)		▽		
Let Guest Users See Other Members of This Community Setting Disabled			~	
Improved Security for Managed Topic Images			~	
Override Entity Permissions When Using <apex:inputfield></apex:inputfield>		▽		
	Security ar	nd Sharing		
Let Users Authenticate by SMS				~
Customize Notifications for Changing Email Addresses	<u>~</u>			
	Other C	hanges		
No Longer Testing Lightning Community Features on Internet Explorer 11		V		
Trusted Site Paths for Lightning Communities Are Case-Sensitive		~		
Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Previously Released Update)		✓		
User Settings and User Profile Summary & Image Components Were Replaced		~		
Enable Article Sharing for High-Volume Community Users			~	
Personalize Communities with Code Settings for Embedded Chat and Channel Menu			<u>~</u>	
The Last Modified Date Is Back		~		

Salesforce CMS

Share your public content with a content delivery network (CDN), import images and documents from your local drive to Salesforce CMS, and organize your CMS content with folders.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Serve CMS Content with a Content Delivery Network (CDN)		~		
Import Local Images and Documents to Salesforce CMS		~		
Organize Salesforce CMS Content with Folders		~		
Salesforce CMS Now Supports Knowledge Articles in the CMS Collections Component		~		
Add Content More Easily with the Enhanced Rich Text Editor		~		
Salesforce CMS Apps and Tabs Are Enabled by Default		~		
Filter by Content Type in Salesforce CMS		~		

Files

Switch your file rendition in Connect REST API from Adobe Flash to SVG.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Switch Your File Rendition in Connect REST API		~		

Mobile

Get more done in the Salesforce mobile app with launchpad, activity timeline, and other productivity boosters. Notifications features give you even more control over your custom notifications. Mobile Publisher for Communities now supports Marketing Cloud push notifications (Pilot). Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and suggested actions (Beta).

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
Salesforce Mobile App					

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Everything That's New in the Salesforce	Mobile App		•	
Salesforce Mobile App Requirements Have Changed	~			
Create Shortcuts to Users' Essential Pages			~	
Cruise Through the App with Improved Scrolling			~	
Keep Track of Your Activities with Activity Timeline on iOS	<u>~</u>			
Get to the Point with Report Highlights	~			
See the Bigger Picture with a Monthly Calendar View	~			
Streamline How Your Mobile Users Access Dashboards from a Record Page	~			
Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android	<u>~</u>			
Stay Productive with Financial Services Cloud Lightning Components for Mobile	~			
Update Your Android Devices' Security Patch	~			
App Store and Google Play Updates	~			
	Notific	ations		
Require User Permission for the Send Custom Notification Action (Update)		~		
Send Your Custom Notification Recipients to New Places with Page Reference Navigation		✓		
	Mobile P	ublisher		
Configure Marketing Cloud Notifications (Pilot)			~	
Use Your Mobile Device Camera to Scan Barcodes (Beta)			~	
Customize How Users Navigate in the Community App (Pilot)			~	
Salesforce Anywhere			~	

Customization

Build and test flows with new layout and debug options, and launch flows when records are deleted. Break up your record details and create more flexible Lightning pages with Dynamic Forms and Dynamic Actions in the Lightning App Builder. Recommend anything to anyone with Einstein Recommendation Builder (beta).

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Lightnir	ng Flow		
Flow Builder				
Trigger a Flow to Run Before a Record Is Deleted		~		
Debug Flow Errors in Sandbox Org as Another User			~	
Debug Autolaunched Flows Directly on the Canvas (Beta)		~		
Build Multi-Column Screens in Flow Builder (Pilot)				~
Place Flow Elements Automatically with Auto-Layout (Beta)		~		
Improve Performance With Record-Triggered Flows That Run Only for Specific Changes		<u>v</u>		
Take a Flow Path Only When Certain Record Changes are Made		~		
Use AND, OR, and Custom Operators Across All Flow Builder Elements		~		
Locate a Flow Builder Error with the Click of a Link		~		
Easily Access Related Record Data in Autolaunched Flows with Triggers		~		
Use Your Salesforce Org's Global Variables Everywhere in Flows		~		
View Merge Field Labels in Flow Builder		~		
Text Template Setting Is Saved		~		
Flow Screen Previews of Picklist and Multi-Select Picklist Components Are No Longer Interactive		~		
Lightning Flow Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience		▽		
Quickly See the Triggers of Your Flows on the Flows Page in Setup		~		
View Flow Labels and Screen Labels in Flow Interview Logs		~		
Run Flows in System Context Without Sharing to Access the Recommendation Object for External Users	~			
Trigger Flows to Run When a Record Owner Is Changed in Salesforce Classic	✓			
Lightning Flow Extensions				
Create Flow Screen Components That Work for Multiple Objects (Generally Available)		~		
Configure Custom Flow Screen Components More Easily (Generally Available)		~		
Configure Custom Flow Screen Components and Actions That Work for Multiple Objects More Easily		<u>~</u>		
Easily Add Actions to Flows from Public Web Services (Pilot)		~		
Lightning Flow Release Updates				
Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Update)			<u>~</u>	
Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)			<u>~</u>	
Enable Partial Save for Invocable Actions (Update, Postponed)			~	
Enforce Data Access in Flow Merge Fields (Update, Postponed)			~	
Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)			~	
Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)			~	
Stop Automated Field Updates from Suppressing Email Notifications (Previously Released Update)			~	
Flow and Process Run-Time Improvements in API Version 50.0			~	
	Lightning A	pp Builder		
Break Up Your Record Details with Dynamic Forms (Generally Available)			~	
Unleash New Flexibility with Dynamic Actions on Desktop (GA and Beta) and Mobile (Beta)			~	
Analyze Your Lightning Page Performance		~		
Lightning App Builder Header and Toolbar Changes		~		
Get Record Types When You Package Lightning Pages		~		
App Performance (Beta) in Lightning App Settings Has Been Retired		~		
Lightning App Builder Accessibility Enhancements		~		
Einstein Builders: Deliver Personalized R Range and	ecommendations (Bet d Top Predictors on Re			nd Show Confidence
Recommend Anything to Anyone with Einstein Recommendation Builder (Beta)			✓	
Einstein Prediction Builder: Become an Expert on Your Prediction Results in an Action-Packed Scorecard			~	
Einstein Prediction Builder: Test Your Prediction's Performance Interactively			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Show Top Predictors and Confidence Range on Records for Numeric Predictions			~	
	Globali	zation		
Understand Translation Import Errors with Improved Email Notifications	~			
Enable ICU Locale Formats (Previously Released Update)			~	
Connect with Customers Who Speak and Read Khmer		~		
Import and Export Larger Data Translation Files	~			
Submit Only One Translation Import or Export Request at a Time	~			
	Profiles and	Permissions		
Improve Org Security with the Profile Filter Option		~		
Check Out the View All Profiles Permission		~		
Restrict Permissions Cloning in Profiles		~		
Use Permission Set Groups in Professional Edition		~		
Understand the Custom Permissions License Required Option		~		
	Salesforce	Connect		
Restricted Access to Authentication in Named Credentials and External Data Source		▼		
Salesforce Connect is HIPAA Compliant		~		
External Object ID Mappings Subject to Expiration		~		
	Einstein Next	Best Action		
Store and Encrypt Healthcare Data with HIPAA-Compliant Einstein Next Best Action		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Event-Driven Recommendations Using Voice Call Records			~	
Add Al-Driven Recommendations to Your Strategies Using Einstein Recommendation Builder (Beta)		<u>~</u>		
	External	Services		
Manage and Recreate Legacy External Services Registrations		~		
Legacy External Services Version Is Being Retired		~		
	Shai	ring		
Deploy Organization-Wide Defaults and Criteria-Based Sharing Rules Together		~		
Secure Guest Users' Org-Wide Defaults and Sharing Model Can't Be Disabled (available within 24 hours after the release)		✓		
	Fie	lds		
Disable Rendering of HTML in Custom Field Labels (Update)		~		
Manage Deleted Fields in Lightning Experience		~		
	Custom Met	adata Types		
Custom Metadata Types Support Geolocation Field Types Relationships		~		
View Supported Relationship Entities When Creating Custom Metadata Types		~		
	Genera	l Setup		
Choose Your Utility Bar Alignment	~			
Choose When to Show the Submit for Approval Action (Generally Available and Beta)			~	
Changes to Record Type Creation UI in Setup		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Require Permission to View Record Names in Lookup Fields (Previously Released Update)			~	
Disable Standard Object Edits on Standard Profile (Update)			~	

Security, Privacy, and Identity

Maintain security, privacy, and governance policies for multiple orgs with Security Center, now generally available. View and manage mobile device access to your org with Mobile Device Tracking, generally available. New Salesforce orgs get a My Domain by default and existing orgs must define one. Keep a closer eye on your org with three new Real-Time Monitoring Events. Encrypt fields associated with health intake documents, and encrypt some Financial Services Cloud documents.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Authenticatio	n and Identity		
Implement MFA with the Multi-Factor Authentication Assistant			~	
We Upgraded to Using Multi-Factor Authentication Terminology			~	
View and Revoke Devices with Mobile Device Tracking				~
Maintain Permission Sets and Public Groups When Using Identity Connect			~	
Perform Cross-Origin Requests to OAuth Endpoints		~		
Secure SAML Messages When Salesforce Is the Identity Provider		~		
Update Identity Provider SAML Requests to Use Lowercase Sandbox Names			~	
OAuth 2.0 User-Agent Flow Supports mobileauth.salesforce.com Redirect URL for Refresh Tokens		~		
Skip Identity Confirmation at Login Permission Was Clarified			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Read and Write Access on User Records for the Identity Connect Integration User			~	
	Dom	ains		
Deploy a My Domain (Update)			~	
Define a My Domain When Creating a New Salesforce Org		✓		
Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)			~	
Setting That Allows Non-Secure HTTP Connections for Sites Was Removed		~		
	Salesford	e Shield		
Shield Platform Encryption: Encrypt Da	ta Associated with Do	ocuments and Depre	cated Release Updat	e
Encrypt Data Associated with Health Intake Documents			~	
Encrypt Identity Document Fields			~	
Encrypt Salesforce CPQ Data			~	
Manage Encryption Keys Permission Removal from System Administrator Profile Release Update Deprecated (Previously Released Update)			~	
Event Monitoring: Transaction Security	Retirement, New Eve	ents		
Legacy Transaction Security: End of Life		~		
Prevent Data Loss with BulkApiResult Event		~		
Detect Anomalies in API Queries with New ApiAnomalyEvent		~		
Analyze Unexpected Exceptions in the Event Monitoring Analytics App		~		
View Einstein Analytics Data Downloads in Your Event Log Files		~		
Correlate Threat Data Easier with Restructured JSON Format		~		
	Other C	hanges		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Changes to the Security, Privacy, and Identity Release Notes Section	▽			
Streamline Security Policy Monitoring with Security Center (Generally Available)			~	
Review and Update Your TLS 1.2 Ciphers			~	
Apex Crypto Class Supports ECDSA		~		

Customer 360 Truth

Learn what's new with Customer 360 Truth. Give your users more identity verification options and data unification to enable personalized interactions. And use one app to create policies to monitor multiple Salesforce orgs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customer 360 Audiences				
Customer 360 Data Manager				
	Identity for Custo	omers & Partners		
Let Your Community Users, Customers, and Partners Verify Their Identities with SMS				~
Require Verification When Community Users, Partners, and Customers Change Their Email Address (Update)			~	
Put Your Own Spin on Your Community's Email Address Change Verification Emails		₹		
	Privacy & Data	a Compliance		
Privacy Center		~		
Consent Event Stream		~		

Deployment

Send customizations from one org to another by adding these components to change sets.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Change Set Components		~		

Development

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Lightning C	omponents		
Add Custom Buttons to the lightning-input-rich-text Base Component (Beta)		V		
Second-Generation Packages Support Lightning Message Channels		~		
Scan a Barcode in a Lightning Web Component (Beta)		~		
Increased Timeout for Client-Side Caching		~		
Aura Components in the ui Namespace Are Being Deprecated			~	
DOM API Changes May Require UI Test Updates		~		
Develop Flow Screen Components That Work for Multiple Objects (Generally Available)		V		
Create Custom Property Editors for Lightning Web Components (Generally Available)		~		
Create Custom Property Editors That Use Generic SObject and SObject[] Inputs in Flows		~		
Lightning Web Components Playground Retirement		~		
Release Updates: Enforcement for Profi	le-Based Access for@	AuraEnabled Apex C	lasses, and More	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Enforced)			<u>~</u>	
Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)			<u>~</u>	
Enable Dependency Access Checks In Lightning Components (Update, Retired)			<u>~</u>	
Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)			<u>~</u>	
Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Postponed)			~	
Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)			~	
Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)			~	
Enable Secure Static Resources for Lightning Components (Update, Postponed)			<u>~</u>	
	Einstein Vision	and Language		
Download the Einstein Vision and Language OpenAPI Spec		~		
Einstein Vision: Endpoint That Returns I	abels Is Deprecated	and Replaced		
Einstein Vision Endpoint That Returns Examples Is Deprecated		~		
Einstein Language: Build Einstein Inten	t Models in More Lan	guages		
Einstein Intent Supports More Languages (Beta)		~		
Einstein Language Endpoint That Returns Examples Is Deprecated		~		
	Visual	lforce		
Second-Generation Packages Support Lightning Message Channels		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Shorten Your Visualforce URLs			~	
Prevent Consecutive API Navigation Calls in Visualforce Pages (Update, Postponed)		✓		
New Attribute on <apex:inputfield> Overrides Entity Edit Permissions</apex:inputfield>		~		
	Ар	ex		
Use the Safe Navigation Operator to Avoid Null Pointer Exceptions		~		
Update Resources with the PATCH HTTP Method in Apex Callouts		~		
Send Custom Notifications from Apex		~		
Detect Apex Runtime Context with Requestld and Quiddity		~		
Improve Apex Testing with New SObject Error Methods		~		
Delete up to 50,000 Big Object Records in a Batch		~		
Enhanced Support for @namespaceAccessible Annotation		~		
	AF	PI		
Make More Powerful Composite Requests		₹.		
	Packa	ging		
Visualize Package Ancestry Tree Using Salesforce CLI		✓		
Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages (Generally Available)		✓		
Delete Unwanted Packages and Package Versions		~		
Get Package Error Notifications		~		
Code Coverage Enforcement for Unlocked Packages		▽		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Specify Unpackaged Metadata for Package Version Creation Tests (Pilot)				~
Ensure That Multi-Factor Authentication Is Configured for License Management Orgs		₹.		
Branch Packaging Orgs Are No Longer Available		~		
9	Scratch Orgs: Org Sha	pe and New Features		
Create Scratch Orgs More Easily Using an Org's Shape (Beta)		~		
Create Scratch Orgs with More Features		~		
	Platform Devel	lopment Tools		
Install the Pre-Release Version of Salesforce CLI		▽		
Lightning Design System	m: Styling Hooks and	Other Component B	lueprint Enhanceme	ents
Customize Components with Lightning Design System Styling Hooks (Beta)		~		
BEM Notation with Double Dashes Is Being Deprecated		~		
Lightning Design System Component Blueprint Updates		~		
	AppExchang	ge Partners		
See Which Locations Drive Listing Activity with AppExchange Marketplace Analytics Activity Summary by Region		₹.		
Test Your Custom Integrations Using AppExchange App Analytics Simulation Mode				~
	Change Da	ta Capture		
Enrich Change Event Messages with Extra Fields (Beta)				~
Receive Change Event Notifications for More Objects		~		
	Platform	Events		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Your Platform Event Trigger Subscriptions from the User Interface		~		
Monitor Event Publishing and Delivery Usage		~		
Make Apex Callouts After Publishing Platform Event Messages		~		
Get the Status of High-Volume Platform Event Publish Operations (Beta)				~

Quip

Mark your embedded Quip documents as templates. Increase template adoption with the Template Library in Quip. Get granular user engagement metrics to see how users are employing Quip templates. Add inline live Salesforce data mentions to a Quip document or spreadsheet. Create hybrid Salesforce and Quip relationship maps.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Discover Quip for Customer 360 Features with the Quip Setup Starter Managed Package			<u>~</u>	
Manage Your Quip Templates in Quip and Salesforce (Template Library)	▽			
Use Metrics to Report on User Engagement with Embedded Quip Templates	✓			
Add In-Line Salesforce Record Fields to a Quip Document (Data Mentions)	✓			
Create a Relationship Map in Quip with Live Salesforce Data	~			
Use Salesforce Record Permissions to Determine Access to Linked Quip Documents			<u>~</u>	
Manage Live Salesforce Data in Quip	~			
Test the Health of Your Quip Connection to Salesforce			~	
Customize Your Salesforce List Views with Filters in Quip			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Simplify Your Quip for Customer 360 Setup, Enablement Process, and Other Enhancements				
Build Custom Automations with New Quip APIs	~			

Pardot

Create, send, and manage your email templates and email content with an enhanced email experience. Connect to Salesforce CMS to host and reuse images for email marketing, and get rollup metrics on the email records you use most. You can also resync prospects faster after import errors are resolved and customize your Einstein Attribution success milestone.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
F	Pardot Email Experien	ce: Email Redesigne	d	
Create Engaging Email Content with Ease	▽			
Source Images from Salesforce CMS for Emails			~	
Review Aggregate Email Metrics in Lightning Experience	▽			
Preview and Test an Email in Lightning Experience	~			
Define Your Email Send	✓			
	Analytics an	d Reporting		
Choose a Success Milestone for Pardot Einstein Attribution			~	
Understand Your Customer with New Campaign Insights	~			
Get Clearer B2BMA Dashboard Metrics	~			
Get Prospect Custom Field Data Faster (Beta)			~	
View More Accurate Email Open and Click Rates in Pardot	▽			
	Marketing Asse	ts and Domains		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use WordPress Block Editor Seamlessly with the Pardot Plugin	~			
Authenticate your WordPress Plugin with Salesforce SSO	<u>~</u>			
Automatically Secure New Pardot Tracker Domains			~	
Customize More Pardot Assets with Any Tracker Domain	<u>~</u>			
Add to Prospect Lists from Contact Related List on Accounts			~	
Sync Prospects with Resolved Errors More Easily			~	
Get Cleaner Data in Standard Campaign Influence Reports	~			
The ObjectChangeLog is Being Retired		~		
Autofill Prospect Location Is Temporarily Unavailable		~		
Pardot Support for Internet Explorer 11 Is Being Retired on December 31, 2020	~			
Pardot API: New and Changed Items		~		
Pardot API Version 5 (Beta)		~		

Release Updates and Security Alerts

View important updates and alerts in a single location in the generally available Release Updates. We added some enhancements to ensure that your Salesforce org stays up to date on all changes that affect its performance, security, and users.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Org Changes in One Location with Release Updates (Generally Available)		~		
Find Security Alerts in the Same Location as Release Updates		~		
Release Updates			~	

myTrailhead

Salesforce Identity for myTrailhead offers quick, easy access to myTrailhead. Your users aren't required to register with Salesforce Trailhead or create a profile. Salesforce Identity for myTrailhead uses an authentication provider that you control, so it lets you grant myTrailhead access to a specific audience. For example, you can target myTrailhead access for your internal users or your community members.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Log In to myTrailhead in One Easy Step)		~	

Supported Browsers

We made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

IN THIS SECTION:

End of Support for Internet Explorer 11 in Lightning Experience

Extended Support for IE11 ends on December 31, 2020. IE11 users see a permanent banner in their Salesforce org, indicating that they're on an unsupported browser. Customers using IE11 aren't blocked from accessing Lightning Experience, but features aren't guaranteed to work correctly. New features are supported and available only on modern browsers.

Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

Supported Browsers for Einstein Analytics

Supported browsers for Einstein Analytics include those supported for Lightning Experience with the following differences: Analytics isn't supported on Apple® Safari®, and Data Prep isn't supported on Internet Explorer 11.

End of Support for Internet Explorer 11 in Lightning Experience

Extended Support for IE11 ends on December 31, 2020. IE11 users see a permanent banner in their Salesforce org, indicating that they're on an unsupported browser. Customers using IE11 aren't blocked from accessing Lightning Experience, but features aren't guaranteed to work correctly. New features are supported and available only on modern browsers.

Where: This change applies to Lightning Experience in all editions.

Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

Where: Lightning Experience is available in the Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.



Note:

- Salesforce doesn't support nonbrowser applications that embed WebView or similar controls to render content for Salesforce Classic or Lightning Experience. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- You can't access Lightning Experience in a mobile browser. Instead, we recommend that you use the Salesforce mobile app when you work on a mobile device.
- You can access Lightning Experience on iPad Safari. For more information, see Lightning Experience on iPad Safari Considerations.
- Lightning Experience doesn't support incognito or other private browsing modes.

Desktops and Laptops

Salesforce supports these following browsers. Make sure that your browsers are up to date. Other browsers or older versions of supported browsers aren't guaranteed to support all features.

- (1) Important: Support for Internet Explorer 11 to access Lightning Experience ended on December 31, 2020.
 - When using IE11, a permanent banner displays in your Salesforce org indicating that you're on an unsupported browser.
 - IE11 has significant performance issues in Lightning Experience.
 - This change doesn't impact Salesforce Classic.
- (1) Important: Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome [™]	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	Not supported	Not supported	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Lightning Communities	Not supported	Not supported	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Special setup considerations?	Not supported	Not supported	No	No	No	No
Limitations?	Yes	Yes	Yes	No	Yes	Yes



Note: The browser vendor defines "latest" for their own browser. Check with your browser vendor to determine the latest version available.

Tablets

Use Apple Safari on iPadOS (iOS 13.x) or later. Portrait orientation and orientation switching aren't supported on Lightning Experience on iPad Safari. Use landscape orientation and maximize your Safari browser to full width. To avoid orientation switching, turn on the iPad rotation lock.

We support only the Salesforce mobile app for Android-based tablets.

	Apple® Safari®	Google Chrome [™]	Other Browsers	Salesforce Mobile App
iPadOS	Supported	Not supported	Not supported	Supported
Android	N/A	Not supported	Not supported	Supported

Note: Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access the Salesforce mobile app on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

Phones

For the best experience, use the Salesforce mobile app.

SEE ALSO:

No Longer Testing Lightning Community Features on Internet Explorer 11

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

Where: Salesforce Classic is available in all editions.

- Note: Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce mobile app when you're working on a mobile device.
- (1) Important: Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome [™]	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 11 only	Supports latest stable browser version (EOL December 31, 2020)	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Salesforce Classic Console	IE 11 only	Supports latest stable browser version (EOL December 31, 2020)	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Not supported
Special setup considerations?	Yes	No	No	No	Yes	No

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome [™]	Mozilla [®] Firefox [®]	Apple® Safari®
Limitations?	Yes	Yes	Yes	No	No	Yes



Note: The browser vendor defines "latest" for their own browser. Check with your browser vendor to determine the latest version available.

Supported Browsers for Einstein Analytics

Supported browsers for Einstein Analytics include those supported for Lightning Experience with the following differences: Analytics isn't supported on Apple® Safari®, and Data Prep isn't supported on Internet Explorer 11.

Salesforce Overall: Release Notes on Salesforce Help, Multi-Factor Authentication, Einstein Search Personalization, and Salesforce Anywhere (Beta)

Starting Wednesday, November 4, 2020, find the Salesforce Release Notes on Salesforce Help, the same place you go for help as well as the release notes for Commerce Cloud, Marketing Cloud, and Customer 360. Use the Multi-Factor Authentication (MFA) Assistant to help roll MFA out to your users. Get personalized search results based on your activity, location, and other factors, with Einstein Search. Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and Lightning Flow invocable actions (Beta). Also, read through our Customer 360 guides and solution kits to help solve complex business cases, add custom themes to in-app guidance, display specific survey pages to participants based on data, and more.

IN THIS SECTION:

Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help

The main Salesforce Release Notes moved to Salesforce Help where they now live in harmony with our help and other technical content plus the release notes for Commerce Cloud, Marketing Cloud, and Customer 360.

Download Release Notes PDFs for Salesforce Releases Before Winter '16

Looking for release notes for Salesforce releases before Winter '16? Click these links to download them in PDF.

Multi-Factor Authentication: Safeguard Account Access

The changes and challenges we face this year make it more important than ever to implement strong security measures that safeguard your business and customers. Amid the increasing complexity of today's security landscape, user credentials alone are no longer adequate to guard against unauthorized account access. To add extra protection from threats like phishing attacks and credential stuffing, we strongly recommend turning on multi-factor authentication (MFA). We're here to help you make the transition with the new Multi-Factor Authentication Assistant.

Search: Find Information Faster and Get the Most Relevant Results

Amp up your productivity using Search. Find the records you want more easily and take action right from the search results page.

Salesforce Anywhere: Plan and Accelerate Your Business in Real Time (Beta)

Salesforce Anywhere is the future experience of CRM — making Salesforce real time. Get alerts about changes to the Salesforce data you care about. Update your Salesforce data in just a few taps with suggested actions. Collaborate in context with chat. Search and view your Salesforce data. And integrate Salesforce Anywhere chat and alerts into your business processes with Lightning Flow and Process Builder.

Cross-Cloud Integrations: Customer 360 Guides, Solution Kits

Explore the Salesforce cross-cloud architecture and identify and solve complex business use cases.

Lightning Experience Engagement: In-App Guidance and Help Menu

Add in-app guidance to more places in your apps. Use custom theme colors to make your in-app guidance stand out. Easily share direct links to in-app guidance. And show more custom resources in the Help Menu. Users can search for Trailhead modules right inside the Help Menu.

Salesforce Surveys: Enhanced Participant Experience, Survey Templates, and More

Enhance the participant experience by using merge fields within survey invitation emails. Use variables to decide which pages your participants view based on your Salesforce org's data. Participants can now read and respond to surveys in right to left languages. Participants who opt out of emails don't receive survey invitations by email. As a survey designer, you can now create template surveys. When you copy a translated survey, the translations get carried over to the new survey. Easily reorder questions on a survey page.

Lightning Scheduler: Controlled and Direct Interaction with External Calendars, Embedded Flows, Greater Scheduling Flexibility, and More

Use the provided developer resources to write appointments directly and securely to, and read events from, external calendars. Schedule appointments in a whole new way by embedding Lightning Scheduler flows into record pages. And enjoy greater scheduling flexibility by associating custom scheduling policies with Lightning Scheduler flows with the new SchedulingPolicyName flow variable.

Prepare for the Microsoft Edge Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Microsoft Edge is changing the default cross-domain (SameSite) behavior of cookies. The SameSite changes are happening in the Chromium project, on which Microsoft Edge is based. This change enhances security and privacy, but requires customers and partners to test custom Salesforce integrations that rely on cookies. We support the ongoing effort to improve privacy and security across the web. We updated the SameSite attribute on cookies set by Salesforce. The fixes are in Winter '21 and they apply to Microsoft Edge 86 and later.

Prepare for Firefox Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Firefox is changing the default cross-domain (SameSite) behavior of cookies. This change enhances security and privacy but requires customers and partners to test custom Salesforce integrations that rely on cookies. We support the ongoing effort to improve privacy and security across the web. We updated the SameSite attribute on cookies set by Salesforce. The fixes are in Winter '21 and are ready for whenever Firefox rolls out the SameSite changes.

Do More with the Optimizer App

The Optimizer App now has even more capabilities to enhance your Salesforce org's implementation. Use two new features to schedule automatic runs and view org metric history and access seven new metrics to improve security.

See More Record Info in Highlights Panels

Hovering over a lookup relationship field on a record page displays the first seven fields from the compact layout in a highlights panel. Previously, the highlights panel displayed only the first five fields.

UI Changes for Lightning Web Components

To enhance usability and performance, some components were switched from Aura components to Lightning Web Components (LWC). Custom objects, some standard objects, and some UI elements like related lists were updated to LWC. There should be no reductions in functionality, but you might notice some minor UI differences.

UI Changes for Cloning Records

The clone records interface now ensures that the correct record details appear. Previously, the clone records dialog also showed read-only fields relevant only to the original record whose values aren't actually cloned to the new record. Also, when using console navigation, the clone action now opens in a subtab instead of a dialog.

Recycle Bin Search Capability Is Being Removed

To avoid performance issues, we removed the search functionality from the Recycle Bin.

Access Setup and Visualforce Pages in Apple® Safari

To protect user privacy, the Prevent Cross-Site Tracking privacy setting is enabled by default in Apple Safari version 13.1 and later. This setting prevents some Setup and Visualforce pages from displaying properly. On the affected Setup pages, a new on-screen message and link allow you to access the page's content by reloading the page in Salesforce Classic. For Visualforce pages, you can change some org metadata so that those pages display properly.

Cisco Webex Is Being Retired

Cisco Webex is scheduled to be retired starting on October 9, 2020, as part of the Winter '21 release.

Skype Is Being Retired

Skype is scheduled to be retired starting on October 9, 2020, as part of the Winter '21 release.

Keep Working with Tab-Focused Dialogs (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation in Winter '21, but has been postponed to Winter '22. In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it.

Reopen Business Transparently with Digital Trust Cards

Show your customers how you keep them safe as your business reopens during COVID. Digital Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a trust card for each of your business locations, and publish them on your website. Each trust card displays trust measures or COVID safety protocols that your business follows.

Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help

The main Salesforce Release Notes moved to Salesforce Help where they now live in harmony with our help and other technical content plus the release notes for Commerce Cloud, Marketing Cloud, and Customer 360.

Where: Your best experience with the Salesforce Help Release Notes is on your desktop because some capabilities aren't yet available on tablet or mobile.

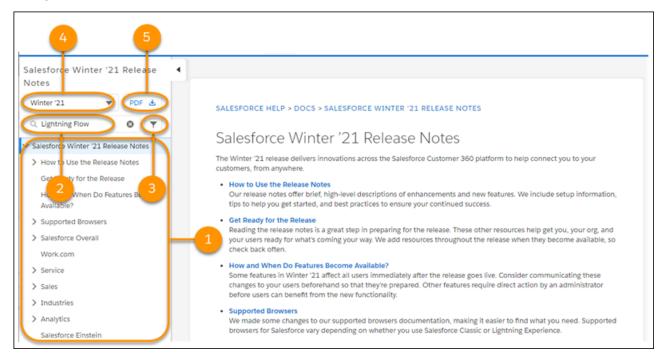
When: Release notes are available in HTML format on Salesforce Help for the Spring '16 through Winter '21 releases. Release notes for previous releases are available in PDF format. The original Salesforce Release Notes portal is being retired in July 2021.

Why: Quite simply, the Release Notes on Salesforce Help provide the best experience for you, our customers. Continue to enjoy the features you know and love, such as version switching and easy PDF downloads, while you also get better search, filtering, case logging, feedback options, and more. Find it all in a cleaner and easier to use interface.

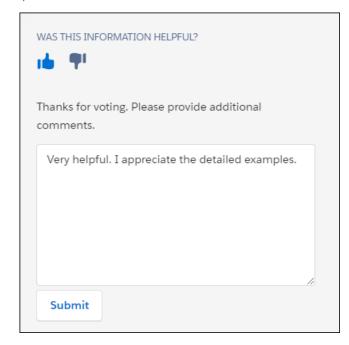
How: Go to help.salesforce.com and click the Release Notes tile for the current Salesforce release. To find topics for the feature you're interested in, you can navigate the table of contents (1) or enter search terms (2) to get a list of results. Filter those results if you need to (3).

Or find topics you want by filtering (3) first. Just click the Filter icon. Filters include Experience: Salesforce Classic, Lightning Experience, and Mobile. And there are filters for Salesforce editions, product areas, and feature impact, such as Enabled for users, Enabled for admins, and so on. Used alone, filters expand the release notes table of contents with matching topics highlighted. To search filtered content and generate a list of search results with your selected filters applied.

Want to check release notes for a different release? Just select the release (4). To download the release notes in PDF for the version you're viewing, click PDF (5).



Have feedback? We welcome it! Tell us about your general experience by posting in the Release Readiness Trailblazers group or tweet us at @salesforcedocs. For release notes topics, you have the same options as help topics: thumbs up or thumbs down. You can include specifics in the Comments field.



SEE ALSO:

Download Release Notes PDFs for Salesforce Releases Before Winter '16 *Blog*: Salesforce Release Notes Have a New Home: Salesforce Help!

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- Spring '14
- Summer '14
- Winter '15
- Spring '15
- Summer '15

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Multi-Factor Authentication: Safeguard Account Access

The changes and challenges we face this year make it more important than ever to implement strong security measures that safeguard your business and customers. Amid the increasing complexity of today's security landscape, user credentials alone are no longer adequate to guard against unauthorized account access. To add extra protection from threats like phishing attacks and credential stuffing, we strongly recommend turning on multi-factor authentication (MFA). We're here to help you make the transition with the new Multi-Factor Authentication Assistant.



Note: In previous releases, multi-factor authentication was called two-factor authentication.

MFA requires users to prove they're who they say they are by providing two or more pieces of evidence—or factors—when they log in. One factor is something the user knows, such as their username and password combination. Other factors are verification methods that the user has in their possession, such as the Salesforce Authenticator app or a physical security key. By tying user access to multiple, different types of factors, it's much harder for a bad actor to access your Salesforce environment.

IN THIS SECTION:

Drive Your Multi-Factor Authentication Implementation from One Place

It's time to add another layer of protection for your Salesforce accounts. Meet the Multi-Factor Authentication Assistant, your hub for all the recommended steps, tools, and resources to roll out MFA to your users. The Assistant guides you through the entire process—from evaluating your requirements and planning the project to launching MFA and supporting users' post-rollout needs.

Renamed Two-Factor Authentication User Permissions and Labels in Setup

For all Salesforce products, we retired two-factor authentication (2FA) terminology and moved to the industry standard term of multi-factor authentication (MFA). To align Lightning Experience and Salesforce Classic with this change, we renamed two-factor authentication user permissions. And we renamed all two-factor and 2FA references throughout Setup and Salesforce documentation, including Salesforce Help, the Salesforce Security Guide, and Salesforce Developer Documentation. This update is a terminology change only—all functionality remains the same.

Drive Your Multi-Factor Authentication Implementation from One Place

It's time to add another layer of protection for your Salesforce accounts. Meet the Multi-Factor Authentication Assistant, your hub for all the recommended steps, tools, and resources to roll out MFA to your users. The Assistant guides you through the entire process—from evaluating your requirements and planning the project to launching MFA and supporting users' post-rollout needs.

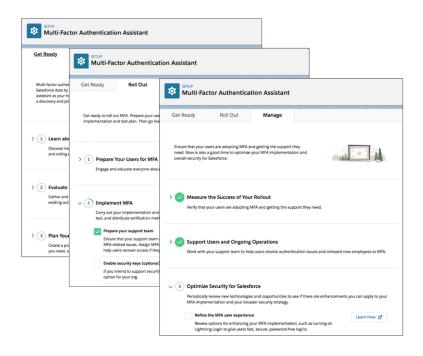
Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: The new Multi-Factor Authentication Assistant is available in Setup for all orgs on a rolling basis between September 18, 2020 and October 17, 2020.

Who: To use the Assistant, you must have the View Setup and Configuration and Customize Application user permissions.

Why: For easier manageability, the Multi-Factor Authentication Assistant breaks up your MFA project into three phases. Each phase provides step-by-step instructions and resources that give you guidance and best practices.

In each phase, steps are organized in stages that keep things organized, help you monitor your progress, and inspire confidence that nothing important is overlooked.



How: Access the Multi-Factor Authentication Assistant from Setup in Lightning Experience. At the top of the menu, click **Multi-Factor Authentication Assistant**.

SEE ALSO:

Salesforce Help: Meet the Multi-Factor Authentication Assistant

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Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions.

What: In Setup, we updated two-factor authentication user permission names. We also updated labels for 2FA-related checkboxes, picklist options, and tooltips, descriptions, and other in-app messages.



Note: 2FA-related object names and field names in SOAP API, including TwoFactorInfo, TwoFactorMethodsInfo, and TwoFactorTempCode, did not change.

How: These user permission names were updated:

Original Permission Name	New Permission Name
Manage Two-Factor Authentication in API	Manage Multi-Factor Authentication in API
Manage Two-Factor Authentication in User Interface	Manage Multi-Factor Authentication in User Interface
Two-Factor Authentication for API Logins	Multi-Factor Authentication for API Logins
Two-Factor Authentication for User Interface Logins	Multi-Factor Authentication for User Interface Logins

On the Identity Verification page in Identity, these labels were updated:

Original Label	New Label
Require identity verification during two-factor authentication (2FA) registration (checkbox)	Require identity verification during multi-factor authentication (MFA) registration
Manage Two-Factor Authentication in API (in the Session Security Level Policies section)	Manage Multi-Factor Authentication in API
Manage Two-Factor Authentication in User Interface (in the Session Security Level Policies section)	Manage Multi-Factor Authentication in User Interface

On the Session Settings page in Security, these labels were updated:

Original Label	New Label
Require identity verification during two-factor authentication (2FA) registration (checkbox)	Require identity verification during multi-factor authentication (MFA) registration
Two Factor Authentication (option in the Session Security Levels section)	Multi-Factor Authentication

We also made these label updates:

- On the Transition Security Policies pages, the Two-factor authentication action is now called Multi-factor authentication.
- On the Identity Verification and Session Settings pages, the Let users authenticate with a physical security key (U2F) checkbox is now called Let users verify their identity with a physical security key (U2F).
- On user detail pages in Setup, and the Advanced User Details page in a user's profile, the App Registration: One-Time Password Generator option is now called App-Registration: One-Time Password Authenticator.

Search: Find Information Faster and Get the Most Relevant Results

Amp up your productivity using Search. Find the records you want more easily and take action right from the search results page.

IN THIS SECTION:

Einstein Search: Personalization (Generally Available), Easier Setup at the Org Level, Improved Natural Language Search (Beta)

Personalization is now generally available. Enable this feature and all other features at the org level with just a few clicks. Get better natural language searches (beta) now that common words are ignored, and go ahead and rename an object supported by natural language search. Einstein Search can find it.

Get Search Results for Newly Searchable Objects

You can search for more objects and fields in your org.

Get Better Search Results for the Name Field in Asian Languages

Search for the name of any object in Chinese, Japanese, Korean, or Thai and get the search results you're expecting. Search has changed how it breaks up names into tokens. Now you can enter a full name or part of a name and get the right records. For example, search for a contact by the last name, and search finds the contact you're looking for. This new method of creating tokens only applies to an object's name field, not to any other text field.

Einstein Search: Personalization (Generally Available), Easier Setup at the Org Level, Improved Natural Language Search (Beta)

Personalization is now generally available. Enable this feature and all other features at the org level with just a few clicks. Get better natural language searches (beta) now that common words are ignored, and go ahead and rename an object supported by natural language search. Einstein Search can find it.



Note: Einstein Search consists of three features: Personalization, Natural Language Search, and Actionable Instant Results. Einstein Search Personalization is a generally available feature. Natural language Search and Actionable Instant Results are beta features. These beta features are previews and aren't part of the "Services" under your master subscription agreement with Salesforce. Use Natural Language Search and Actionable Instant Results at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of beta features within any particular time frame or at all, and we can discontinue these features at any time. Beta features are for evaluation purposes only, not for production use. These beta features are offered as is and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of these beta features. For questions and feedback about this feature, contact mailto:TryEinsteinSearch@salesforce.com.

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IN THIS SECTION:

Enable Personalization to Tailor Search Results to Each User (Generally Available)

Personalization is generally available for Accounts, Cases, Contacts, Leads, and Opportunities. With this powerful feature, users do the same searches as before, but now Einstein Search reranks results to what's relevant to individual users. And don't worry, no applicable results are discarded.

Step Up Productivity with Einstein Search in Professional Edition

Einstein Search is now available with Professional Edition. You can turn on personalization (generally available), natural language search (beta), actionable instant results (beta), and recommended results (beta).

Click Three Times to Enable Einstein Search for Your Org

Empower your Salesforce org with Einstein Search in just a few clicks. You can turn on personalization (generally available), actionable instant results (beta), and natural language search (beta) at the org level. You can still enable instant results and natural language search by configuring user-level permission sets, but the org-level settings override user-level settings.

Benefit from Smarter Natural Language Search Results (Beta)

Einstein Search is getting smarter by ignoring common words that aren't relevant to your search results. For natural language searches, Salesforce filters out articles (the, a, an), pronouns (he, she, it), prepositions (above, before), and other simple words. Eliminating these types of words improves search results for phrases that include those words.

Rename It—Einstein Search Finds It (Beta)

Einstein Search can now return results for searches that use renamed objects. You can rename the standard objects that natural language search supports, which are account, case, lead, contact, and opportunity. For example, if you rename Accounts to Pharmacies or Opportunities to Deals, users can search for *pharmacies in Seattle* and *my open deals last week*.

Benefit from Al-Powered Einstein Search in Government Cloud

Einstein Search is now available for Salesforce orgs in Government Cloud. Your users can find what they're looking for faster with the benefits of Einstein Search personalization, actionable instant results (beta), and natural language search (beta). There are some limitations for natural language search in Government Cloud. Some filters, such as location and date aren't supported. For example, don't try queries, such as my accounts in San Francisco and closed cases last week.

SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Enable Personalization to Tailor Search Results to Each User (Generally Available)

Personalization is generally available for Accounts, Cases, Contacts, Leads, and Opportunities. With this powerful feature, users do the same searches as before, but now Einstein Search reranks results to what's relevant to individual users. And don't worry, no applicable results are discarded.

Where: This change applies to Lightning Experience and all versions of the Salesforce Mobile app in Professional, Enterprise, Performance, and Unlimited editions.

Who: To use personalization, enable the Einstein Search org preference.

Why: Personalization customizes searches based on factors such as recent user activity, geographic location where users work most often, and ownership of objects. Prioritizing those results over others makes users more productive, which saves time and money.

SEE ALSO:

Salesforce Help: Personalized Search Results (can be outdated or unavailable during release preview)

Step Up Productivity with Einstein Search in Professional Edition

Einstein Search is now available with Professional Edition. You can turn on personalization (generally available), natural language search (beta), actionable instant results (beta), and recommended results (beta).

Where: This change applies to Lightning Experience and all versions of the Salesforce mobile app in Professional edition. The Salesforce mobile app supports only personalization and recommended results (beta), but not actionable instant results (beta) or natural language search (beta).

Who: To use all Einstein Search features, select all three Einstein Search org preferences.

Click Three Times to Enable Einstein Search for Your Org

Empower your Salesforce org with Einstein Search in just a few clicks. You can turn on personalization (generally available), actionable instant results (beta), and natural language search (beta) at the org level. You can still enable instant results and natural language search by configuring user-level permission sets, but the org-level settings override user-level settings.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: To use Einstein Search, enable the Einstein Search org preferences.

Why: Personalization is no longer the only feature you set at the org level. Now it's even easier to improve user productivity by making the other features available at the org-level too.

How: To enable Einstein Search features:

- 1. From Setup, in the Quick Find box, type <code>Enable Einstein Search</code>, and then select <code>Enable Einstein Search</code>.
- 2. To enable all Einstein Search features, select all three checkboxes.



Note: Natural language search requires actionable instant results.

SEE ALSO:

Salesforce Help: Enable Einstein Search (can be outdated or unavailable during release preview)

Benefit from Smarter Natural Language Search Results (Beta)

Einstein Search is getting smarter by ignoring common words that aren't relevant to your search results. For natural language searches, Salesforce filters out articles (the, a, an), pronouns (he, she, it), prepositions (above, before), and other simple words. Eliminating these types of words improves search results for phrases that include those words.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: To use natural language search, select the Einstein Search org preference for this feature. Natural language search requires actionable instant results, so that org preference gets automatically selected.

SEE ALSO:

Salesforce Help: Natural Language Search Examples (Beta) (can be outdated or unavailable during release preview)

Rename It—Einstein Search Finds It (Beta)

Einstein Search can now return results for searches that use renamed objects. You can rename the standard objects that natural language search supports, which are account, case, lead, contact, and opportunity. For example, if you rename Accounts to Pharmacies or Opportunities to Deals, users can search for pharmacies in Seattle and my open deals last week.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: To use natural language search, select the Einstein Search org preference for this feature. Natural language search requires actionable instant results, so that org preference gets automatically selected.

Why: You want to rename an object to something more relevant to your business, using terms that they are likely to enter in a natural language search. Einstein Search can find results for the renamed object. However, users can no longer search using the original standard object name. For example, *accounts in Seattle* doesn't work anymore.

How: From Setup, in the Quick Find box, type Rename Tabs and Labels, and then select Rename Tabs and Labels.

SEE ALSO:

Salesforce Help: Rename Object, Tab, and Field Labels (can be outdated or unavailable during release preview)

Benefit from Al-Powered Einstein Search in Government Cloud

Einstein Search is now available for Salesforce orgs in Government Cloud. Your users can find what they're looking for faster with the benefits of Einstein Search personalization, actionable instant results (beta), and natural language search (beta). There are some limitations for natural language search in Government Cloud. Some filters, such as location and date aren't supported. For example, don't try queries, such as my accounts in San Francisco and closed cases last week.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited Editions.

Who: To use all Einstein Search features, select all three Einstein Search org preferences.

Why: Your users can boost their productivity with Einstein Search. Personalization tailors search results for how your users work in Salesforce. Users can take action on results from the moment they start typing in the global search box. And natural language search lets your users easily filter lists of records instead of running reports.

How: To enable Einstein Search, from Setup, enter Einstein Search. Select Enable Einstein Search and select all three checkboxes. That's itl

SEE ALSO:

Salesforce Help: Natural Language Search Examples (Beta) (can be outdated or unavailable during release preview)
Salesforce Help: Enable Einstein Search (can be outdated or unavailable during release preview)

Get Search Results for Newly Searchable Objects

You can search for more objects and fields in your org.

Where: These changes apply to Lightning Experience and Salesforce Classic.

The following objects are now searchable:

Object	Where
Ai Visit Recommendation	Consumer Goods, Professional, Unlimited, and Enterprise editions in Lightning Experience
Ai Visit Recommend Request	Consumer Goods, Professional, Unlimited, and Enterprise editions in Lightning Experience
Asset Warranty	Field Service, Enterprise, Performance, Unlimited, and Developer Editions in Salesforce Classic and Lightning Experience
Crisis	Employee 360, Enterprise and Unlimited editions in Lightning Experience (Requires the Workplace Command Center add-on license)
Expense Report	Field Service, Enterprise, Performance, Unlimited, and Developer Editions in Salesforce Classic and Lightning Experience

Object	Where
Expense Report Entry	Field Service, Enterprise, Performance, Unlimited, and Developer Editions in Salesforce Classic and Lightning Experience
Gtwy Prov Payment Method Type	Commerce Cloud, Enterprise, Unlimited, and Developer editions in Salesforce Classic and Lightning Experience
Internal Organization Unit	Employee 360, Enterprise and Unlimited editions in Lightning Experience (Requires the Workplace Command Center add-on license)
Ocr Document Scan Result	Health Cloud, Enterprise, Performance, and Unlimited editions in Lightning Experience
Process Exception	Commerce Cloud, Enterprise, Unlimited, and Developer editions in Lightning Experience
Product Warranty Term	Field Service, Enterprise, Performance, Unlimited, and Developer Editions in Salesforce Classic and Lightning Experience
Received Document	Health Cloud, Enterprise, Performance, and Unlimited editions in Lightning Experience
Residential Loan Application	Financial Services Cloud, Professional, Enterprise, and Unlimited editions in Lightning Experience

SEE ALSO:

Salesforce Help: Searchable Fields by Object in Lightning Experience (can be outdated or unavailable during release preview)
Salesforce Help: Searchable Fields by Object in Salesforce Classic (can be outdated or unavailable during release preview)

Get Better Search Results for the Name Field in Asian Languages

Search for the name of any object in Chinese, Japanese, Korean, or Thai and get the search results you're expecting. Search has changed how it breaks up names into tokens. Now you can enter a full name or part of a name and get the right records. For example, search for a contact by the last name, and search finds the contact you're looking for. This new method of creating tokens only applies to an object's name field, not to any other text field.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

Why: Asian language words do not have any whitespace, so the search engine uses a special method of splitting up names into tokens for better search results.

Salesforce Anywhere: Plan and Accelerate Your Business in Real Time (Beta)

Salesforce Anywhere is the future experience of CRM — making Salesforce real time. Get alerts about changes to the Salesforce data you care about. Update your Salesforce data in just a few taps with suggested actions. Collaborate in context with chat. Search and view your Salesforce data. And integrate Salesforce Anywhere chat and alerts into your business processes with Lightning Flow and Process Builder.



Note: Salesforce Anywhere is a Non-GA Service and not a "Service" or part of the "Services", as defined in the Master Subscription Agreement ("MSA") with Salesforce. Such Non-GA Service is subject to the terms and conditions of the Universal Pilot Research Agreement ("UPRA"), including the Data Processing Addendum to the UPRA. Use of this Non-GA Service is at your sole discretion, and any purchase decisions should be made only on the basis of Salesforce generally available products and features. Automatic availability of Salesforce Anywhere depends on your MSA with Salesforce and the type of Services you have purchased. If you do not see Salesforce Anywhere in Setup, contact your Account Executive to get access to Salesforce Anywhere.

Learn about the latest features in the Salesforce Anywhere Release Notes.

SEE ALSO:

Salesforce Anywhere Overview

Cross-Cloud Integrations: Customer 360 Guides, Solution Kits

Explore the Salesforce cross-cloud architecture and identify and solve complex business use cases.

IN THIS SECTION:

Introducing Customer 360 Guides

Customer 360 Guides bring together assets for c-suite executives, line-of-business leaders, architects, and developers to drive digital transformation and engage customers.

Introducing Customer 360 Guides

Customer 360 Guides bring together assets for c-suite executives, line-of-business leaders, architects, and developers to drive digital transformation and engage customers.

Why: Explore relevant change management processes, examine the Salesforce architecture, map business capabilities to solutions, and solve critical business use cases that cross clouds and products. Each quide contains curated assets from across Salesforce.

- Customer Stories
- Playbooks
- Change Management Information
- Thought Leadership
- Industry Blueprints
- Reference Architectures
- Solution Architectures
- Business Scenarios
- Solution Kits

How: Find Customer 360 Guides at https://trailhead.salesforce.com/guides.

IN THIS SECTION:

Transform the Consumer Experience

Deliver personalized, genuine customer experiences that promote growth of unique shoppers, increase site traffic, and create higher demand with the Transform the Consumer Experience Customer 360 Guide.

Transform the Consumer Experience

Deliver personalized, genuine customer experiences that promote growth of unique shoppers, increase site traffic, and create higher demand with the Transform the Consumer Experience Customer 360 Guide.

Why: Companies that don't engage with customers at the right moment struggle to keep up with competitors. This guide helps you identify goals for digital transformation, assess your business needs, map your goals, and deliver solutions.

How: Access the complete Transform the Consumer Experience Guide at https://tcxquide-salesforce.herokuapp.com/.

IN THIS SECTION:

Turn Abandoned Carts into Completed Sales Solution Kit

Connect with shoppers who add items to their carts but don't finish orders. Send personalized behavioral messages that encourage them to return and complete and purchase.

Redeem Coupons Solution Kit

Offer targeted customer journeys and increase positive purchasing decisions. Increase completed purchases, personalize the experience, and track coupon usage.

Order on Behalf of a Customer Solution Kit

Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.

Personalize Marketing Recommendations Solution Kit

Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.

Keep Customers in the Loop with Transactional Email Solution Kit

Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.

View Order History and Cancel Orders Solution Kit

Enhance customer service and let your agents cancel orders. Personalize the experience by connecting Commerce Cloud and Service Cloud

Engage Customers with Conversational Commerce Solution Kit

Provide richer customer service and drive sales when you implement live agent chat or chatbots within Commerce Cloud. Build brand loyalty, check order status, and offer extra assistance at the hands of service agents.

Implement Seamless Cross-Cloud Identity Solution Kit

Unify customer data with a single identity for each customer across your ecommerce sites and your communities. Enable one identity and give the customer visibility through the entire product catalog.

Explore Cross-Cloud Engagement Data Models Solution Kit

Improve customer loyalty by establishing a common profile for each customer across Marketing Cloud, Commerce Cloud, and Sales, Service, or Community Clouds. Determine the best system of record for each type of customer data to take advantage of out-of-the-box cloud integrations.

Run Conversational Campaigns for WhatsApp Solution Kit

Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.

Run Conversational Campaigns for SMS Solution Kit

Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.

Communicate Store Changes Solution Kit

Build trust with your customers by keeping them updated on your store policies, hours, and any changes to locations.

Schedule an Appointment Solution Kit

Implement scalable processes to let shoppers schedule appointments to meet locally managed or customer-preferred social distancing preferences.

Facilitate Curbside Pickup Solution Kit

Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.

Turn Abandoned Carts into Completed Sales Solution Kit

Connect with shoppers who add items to their carts but don't finish orders. Send personalized behavioral messages that encourage them to return and complete and purchase.

Who: Businesses who want to integrate Commerce Cloud with Marketing Cloud to reduce cart abandonment.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Redeem Coupons Solution Kit

Offer targeted customer journeys and increase positive purchasing decisions. Increase completed purchases, personalize the experience, and track coupon usage.

Who: Businesses who want to integrate Commerce Cloud with Marketing Cloud to let customers redeem coupons.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Order on Behalf of a Customer Solution Kit

Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.

Who: Businesses who want to integrate Commerce Cloud with Service Cloud to help customers place orders.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Personalize Marketing Recommendations Solution Kit

Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.

Who: Businesses who want to integrate Marketing Cloud with Commerce Cloud to personalize their marketing.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Keep Customers in the Loop with Transactional Email Solution Kit

Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.

Who: Businesses who want to integrate Marketing Cloud with Commerce Cloud to send transactional email to customers.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

View Order History and Cancel Orders Solution Kit

Enhance customer service and let your agents cancel orders. Personalize the experience by connecting Commerce Cloud and Service Cloud.

Who: Businesses who want to integrate Service Cloud with Commerce Cloud to let agents view the history of an order or cancel it.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Engage Customers with Conversational Commerce Solution Kit

Provide richer customer service and drive sales when you implement live agent chat or chatbots within Commerce Cloud. Build brand loyalty, check order status, and offer extra assistance at the hands of service agents.

Who: Businesses who want to integrate Service Cloud with Commerce Cloud to engage customers at key points of their shopping experience.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Implement Seamless Cross-Cloud Identity Solution Kit

Unify customer data with a single identity for each customer across your ecommerce sites and your communities. Enable one identity and give the customer visibility through the entire product catalog.

Who: Businesses who want to integrate Commerce Cloud, Community Cloud, and Salesforce Identity to enable one identity and log in across clouds.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Explore Cross-Cloud Engagement Data Models Solution Kit

Improve customer loyalty by establishing a common profile for each customer across Marketing Cloud, Commerce Cloud, and Sales, Service, or Community Clouds. Determine the best system of record for each type of customer data to take advantage of out-of-the-box cloud integrations.

Who: Businesses who want to integrate Commerce Cloud; Marketing Cloud; Sales, Service, or Community Cloud; using connectors and Customer 360 Data Manager to optimize cross-cloud implementations to achieve a 360-degree view of their customers.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Run Conversational Campaigns for WhatsApp Solution Kit

Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.

Who: Businesses who want to integrate Marketing Cloud, Sales Cloud, and other products to Include a WhatsApp direct message link as a footer in all promotional SMS messages.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Run Conversational Campaigns for SMS Solution Kit

Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.

Who: Businesses who want to integrate Marketing Cloud, Sales Cloud, Service Cloud, and other products to include a keyword prompt as a footer in all promotional SMS messages.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Communicate Store Changes Solution Kit

Build trust with your customers by keeping them updated on your store policies, hours, and any changes to locations.

Who: Businesses who want to integrate Commerce Cloud with Marketing Cloud to reduce cart abandonment.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Schedule an Appointment Solution Kit

Implement scalable processes to let shoppers schedule appointments to meet locally managed or customer-preferred social distancing preferences.

Who: Businesses who want to integrate Commerce Cloud with Marketing Cloud to reduce cart abandonment.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Facilitate Curbside Pickup Solution Kit

Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.

Who: Businesses who want to integrate Commerce Cloud with Marketing Cloud to reduce cart abandonment.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Lightning Experience Engagement: In-App Guidance and Help Menu

Add in-app guidance to more places in your apps. Use custom theme colors to make your in-app guidance stand out. Easily share direct links to in-app guidance. And show more custom resources in the Help Menu. Users can search for Trailhead modules right inside the Help Menu.

IN THIS SECTION:

Add In-App Guidance to New, Edit, and Clone Pages

Help users along as they create, edit, and clone records, including dialogs, with in-app guidance.

Add Custom Theme Colors to In-App Guidance

Make your in-app guidance contrast or complement your org's theme color and branding. Choose from a color palette based on your org's theme to see how Salesforce makes your in-app guidance pop.

Share a Direct Link to In-App Guidance

Send users and collaborators a direct link to prompts and walkthroughs. Or, add the URL to your Help Menu to enhance your training materials. The URL immediately opens the in-app guidance unless the guidance is inactive or outside of the scheduled date range.

Search Trailhead from the Help Menu

Review Trailhead search results right from the Help Menu inside the app. Previously, only product documentation was available to search in the Help Menu.

Add More Custom Resources to the Help Menu

Specify up to 30 resources in your custom section of the Help Menu. Previously, you could only add up to 15 resources. Add in links to training documentation, onboarding resources, videos, or in-app guidance so users have the resources they need inside their workspace.

Learn About Salesforce In-App Content

Stay up to date on the valuable in-app prompts, welcome mats, and popovers Salesforce shows admins and end users.

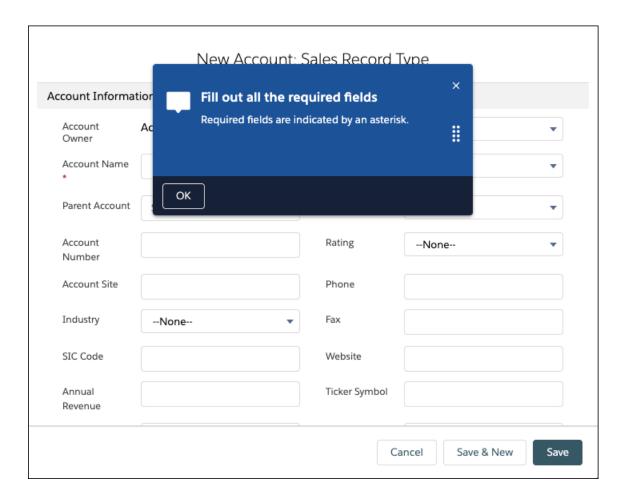
Add In-App Guidance to New, Edit, and Clone Pages

Help users along as they create, edit, and clone records, including dialogs, with in-app guidance.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

To show you custom walkthroughs to users, subscribe to myTrailhead to get the Access Walkthroughs permission set license and the Walkthroughs permission set. Assign the View Walkthroughs user permission to users you want to be able to see walkthroughs. Contact your Salesforce account executive for pricing details.

How: Add in-app guidance to a new, edit, or clone record page type as you would any other page.



You can't add more steps to a nondialog page after adding a step to a new, edit, or clone dialog. If a new or clone record page has multiple record types, the walkthrough displays on the picklist for choosing a record type.

SEE ALSO:

Salesforce Help: In-App Guidance in Lightning Experience (can be outdated or unavailable during release preview)

AppExchange: In-App Guidance Walkthroughs: Getting Started for Sales Users

AppExchange: In-App Guidance Dashboard: Prompt Engagement

AppExchange: In-App Guidance Dashboard: Walkthrough Engagement

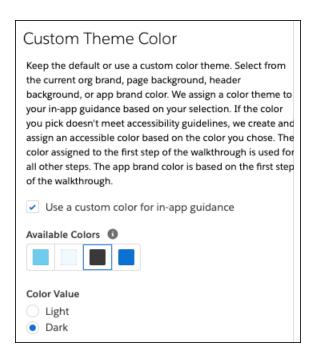
Add Custom Theme Colors to In-App Guidance

Make your in-app guidance contrast or complement your org's theme color and branding. Choose from a color palette based on your org's theme to see how Salesforce makes your in-app guidance pop.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. This change isn't available for the Internet Explorer 11 browser.

To show you custom walkthroughs to users, subscribe to myTrailhead to get the Access Walkthroughs permission set license and the Walkthroughs permission set. Assign the View Walkthroughs user permission to users you want to be able to see walkthroughs. Contact your Salesforce account executive for pricing details.

How: As you create prompts and walkthroughs in the In-App Guidance Builder, check Use a custom color for in-app guidance.



Then choose from up to four colors, which are taken from the org's current org brand, page background, header background, or app brand color. Salesforce ensures that the colors are accessible by darkening the color or by increasing the contrast color ratio. If you change the theme colors on the Themes and Branding Setup page or in the App Builder, the in-app guidance theme colors are also updated.



You can also switch to a dark color value for each color.



SEE ALSO:

Salesforce Help: In-App Guidance in Lightning Experience (can be outdated or unavailable during release preview)

AppExchange: In-App Guidance Walkthroughs: Getting Started for Sales Users

AppExchange: In-App Guidance Dashboard: Prompt Engagement

AppExchange: In-App Guidance Dashboard: Walkthrough Engagement

Share a Direct Link to In-App Guidance

Send users and collaborators a direct link to prompts and walkthroughs. Or, add the URL to your Help Menu to enhance your training materials. The URL immediately opens the in-app guidance unless the guidance is inactive or outside of the scheduled date range.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

To show custom walkthroughs to users, subscribe to myTrailhead to get the Access Walkthroughs permission set license and the Walkthroughs permission set. Assign the View Walkthroughs user permission to users you want to be able to see walkthroughs. Contact your Salesforce account executive for pricing details.

How: There are two ways to copy the shareable URL to your clipboard for pasting. Click Copy URL from either the:

- Row-level action menu on the In-App Guidance Setup page.
- Settings from inside the In-App Guidance Builder on the Details dialog. Edit the in-app guidance to see the Settings gear icon.

If you change the API name of the in-app guidance, the URL changes.

If the prompt or walkthrough is on a record page type, the URL specifies that exact record, not any record type. For example, the URL opens on the Acme account record, not any account record. But, if the user doesn't have access to the record, the in-app guidance opens on the same object record that the user has access to.

SEE ALSO:

Salesforce Help: In-App Guidance in Lightning Experience (can be outdated or unavailable during release preview)

AppExchange: In-App Guidance Walkthroughs: Getting Started for Sales Users

AppExchange: In-App Guidance Dashboard: Prompt Engagement

AppExchange: In-App Guidance Dashboard: Walkthrough Engagement

Search Trailhead from the Help Menu

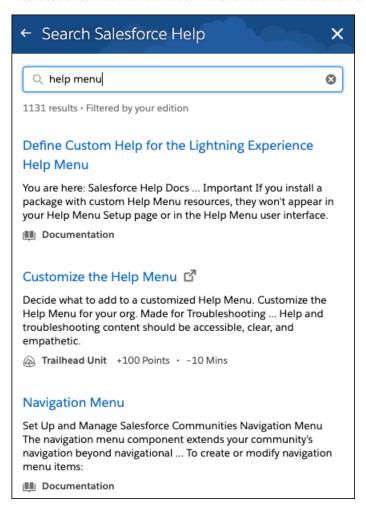
Review Trailhead search results right from the Help Menu inside the app. Previously, only product documentation was available to search in the Help Menu.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Click **Search Salesforce Help** and enter a search term.



Enter a search term to view both documentation and Trailhead search results.



When you open a Trailhead link in the search results, a new browser tab opens.

SEE ALSO:

Salesforce Help: Define Custom Help for the Lightning Experience Help Menu (can be outdated or unavailable during release preview)

Add More Custom Resources to the Help Menu

Specify up to 30 resources in your custom section of the Help Menu. Previously, you could only add up to 15 resources. Add in links to training documentation, onboarding resources, videos, or in-app guidance so users have the resources they need inside their workspace.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Define Custom Help for the Lightning Experience Help Menu (can be outdated or unavailable during release preview)

Learn About Salesforce In-App Content

Stay up to date on the valuable in-app prompts, welcome mats, and popovers Salesforce shows admins and end users.

Where: The availability of in-app content varies by feature.

Why: Avoid duplicating information as you create your own prompts or other in-app content.

In the Winter '21 release, Salesforce added the following prompts.

- A series of floating prompts that let admins know about the Multi-Factor Authentication Assistant, then guides them through completing key steps in the MFA adoption journey.
- A docked prompt to encourage admins to use Dynamic Forms, and highlights the localization feature.
- A docked prompt to highlight the benefits of planning territories in Salesforce Maps, and then integrating them with Enterprise Territory Management.
- Two feature popovers to highlight target status filters used to organize work queue items.
- A feature popover to educate users about the feature when Einstein Search is turned on by the admin.

You can turn off in-app content authored by Salesforce from the In-App Guidance Setup page. The MFA prompts are controlled by the Disable MFA Admin Prompts checkbox on the User Interface page.

SEE ALSO:

Salesforce Help: Salesforce In-App Content in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Surveys: Enhanced Participant Experience, Survey Templates, and More

Enhance the participant experience by using merge fields within survey invitation emails. Use variables to decide which pages your participants view based on your Salesforce org's data. Participants can now read and respond to surveys in right to left languages. Participants who opt out of emails don't receive survey invitations by email. As a survey designer, you can now create template surveys. When you copy a translated survey, the translations get carried over to the new survey. Easily reorder questions on a survey page.

IN THIS SECTION:

Display Survey Pages Based on Your Data

Let data in your Salesforce org determine which survey page participants view next. Use variables to define conditions in your page branching logic. Use associated record merge field variables and participant record merge field variables to define field-level conditions. Use org variables to define conditions based on your org's information. Use custom variables to define conditions based on values that you define.

Personalize Survey Questions Within Email

Give your participants a VIP experience by personalizing survey questions that are embedded within an email invitation.

Email Survey Invitations to 300 Participants

You can email survey invitations to up to 300 participants using a new Connect REST API resource. The Connect REST API also let's you to associate SurveySubject supported object records to survey invitations.

Give Your Colleagues a Head Start with Template Surveys

Survey creators can now build on each others' work. Create template surveys and automatically share them with users in your Salesforce org. Based on their survey record-level access, users can view or copy the template. Template surveys aren't protected intellectual property, so you can distribute them to other orgs, partners, and customers.

Move Questions Around on a Page

Reorder questions on a survey page with the click of a button.

Retain Translations from a Copied Survey

Save your translator time and effort. When you copy a survey, the translations from the copied survey automatically carry over to the new survey.

Improve Participants' Experience when Responding in Right to Left Languages

Connect with your global participants better with improved right-to-left language support. The survey reads right to left when a participant chooses to respond in a right-to-left language.

Respect Email Opt Out Preferences

Respect your participants' preference to not receive emails. Contacts and leads who opt out of receiving emails don't receive survey invitation emails. Email opt out applies to survey invitations that are emailed from the Survey Builder or that use automated processes.

Consider Your Org's Email Limits

Survey invitation emails sent to participants outside your Salesforce org now count toward the total daily emails sent from your org. When emailing survey invitations, keep your org's daily email limit in mind. Contact your Salesforce account executive to extend your org's email limit.

Single Selection Question Look and Feel Was Changed

When survey participants respond to or admins preview a Single Selection question, they now click an answer choice to select it. Previously, they used radio buttons.

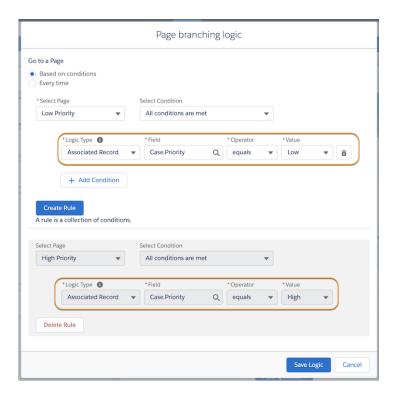
Display Survey Pages Based on Your Data

Let data in your Salesforce org determine which survey page participants view next. Use variables to define conditions in your page branching logic. Use associated record merge field variables and participant record merge field variables to define field-level conditions. Use org variables to define conditions based on your org's information. Use custom variables to define conditions based on values that you define.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Who: To create page branching logic based on field values, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

How: Open a survey, click **Advanced Settings**, and select **Merge Field Variables**. Select the associated object and the participant object. Define one or more org variables, and your custom variables. Click **Back to Builder**. Click on the page you want to create page branching logic for. Select a logic type, and then select either a merge field or a variable. Provide the value to validate the logic against.



SEE ALSO:

Salesforce Help: Define Page Branching Logic Based on Merge Fields (can be outdated or unavailable during release preview)

Personalize Survey Questions Within Email

Give your participants a VIP experience by personalizing survey questions that are embedded within an email invitation.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Who: To define variables and use merge fields, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

How: When you email a survey question using an automated process such as Support Settings or Process Builder, the merge fields in the question resolve in the email.



SEE ALSO:

Salesforce Help: Use Merge Fields to Personalize Surveys (can be outdated or unavailable during release preview)

Email Survey Invitations to 300 Participants

You can email survey invitations to up to 300 participants using a new Connect REST API resource. The Connect REST API also let's you to associate SurveySubject supported object records to survey invitations.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

Connect REST API Developer Guide: Salesforce Surveys Invitation Emails Resource (can be outdated or unavailable during release preview)

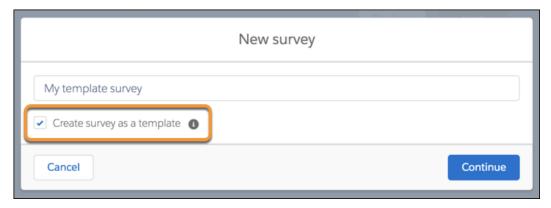
Apex Developer Guide: Survey Class (can be outdated or unavailable during release preview)

Give Your Colleagues a Head Start with Template Surveys

Survey creators can now build on each others' work. Create template surveys and automatically share them with users in your Salesforce org. Based on their survey record-level access, users can view or copy the template. Template surveys aren't protected intellectual property, so you can distribute them to other orgs, partners, and customers.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: On the Surveys list view, click **New**. In the New survey modal, select **Create survey as a template**. You can also create a template survey when copying an existing survey. To see whether a survey is a template, look for the word Template on the Survey Builder.



SEE ALSO:

Salesforce Help: Create a Survey (can be outdated or unavailable during release preview)

Move Questions Around on a Page

Reorder questions on a survey page with the click of a button.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: Use the up and down arrows above the rich text editor of a question to move the question before or after another question.



Retain Translations from a Copied Survey

Save your translator time and effort. When you copy a survey, the translations from the copied survey automatically carry over to the new survey.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

Salesforce Help: Copy a Survey (can be outdated or unavailable during release preview)

Improve Participants' Experience when Responding in Right to Left Languages

Connect with your global participants better with improved right-to-left language support. The survey reads right to left when a participant chooses to respond in a right-to-left language.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

Salesforce Help: How Do Participants View Translated Surveys? (can be outdated or unavailable during release preview)
Salesforce Help: Right-to-Left (RTL) Language Support (can be outdated or unavailable during release preview)

Respect Email Opt Out Preferences

Respect your participants' preference to not receive emails. Contacts and leads who opt out of receiving emails don't receive survey invitation emails. Email opt out applies to survey invitations that are emailed from the Survey Builder or that use automated processes.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: If contact or lead records have the Email Opt Out field checked, the email IDs associated with those records don't receive survey invitations emails

SEE ALSO:

Salesforce Help: Email Opt Out (can be outdated or unavailable during release preview)

Consider Your Org's Email Limits

Survey invitation emails sent to participants outside your Salesforce org now count toward the total daily emails sent from your org. When emailing survey invitations, keep your org's daily email limit in mind. Contact your Salesforce account executive to extend your org's email limit.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

Salesforce Help: Mass Email Limitations (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: Increase your daily Mass Email limit (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: Increase the Daily Single Email Message limit for your organization (can be outdated or unavailable during release preview)

Single Selection Question Look and Feel Was Changed

When survey participants respond to or admins preview a Single Selection question, they now click an answer choice to select it. Previously, they used radio buttons.

Where: This change applies to Lightning Experience in Performance, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Lightning Scheduler: Controlled and Direct Interaction with External Calendars, Embedded Flows, Greater Scheduling Flexibility, and More

Use the provided developer resources to write appointments directly and securely to, and read events from, external calendars. Schedule appointments in a whole new way by embedding Lightning Scheduler flows into record pages. And enjoy greater scheduling flexibility by associating custom scheduling policies with Lightning Scheduler flows with the new SchedulingPolicyName flow variable.

IN THIS SECTION:

Write Lightning Scheduler Appointments Directly to External Calendars

We added a setting and developer resources to help you write Lightning Scheduler appointments directly to external calendars. When you enable the new Publish Appointments as Platform Events setting, Lightning Scheduler triggers platform events for new, modified, or deleted appointments. You can capture and write those events to external calendars using APIs.

Check Resource Availability Directly from External Calendars

Now you can check external calendar events for service resource availability without synchronizing with the Salesforce calendar. Write an Apex class implementing the provided interface to check external calendar events for requested service resources and timelines and return the unavailable time slots. Lightning Scheduler excludes those time slots when showing the list of available time slots for those service resources.

Schedule Appointments in a Whole New Way

You can now embed Lightning Scheduler flows into record pages. Users can schedule, modify, or cancel appointments without launching the flow in a separate window over the record page, which blocks their access to details on the page.

Use Custom Scheduling Policies with Lightning Scheduler Flows

Enjoy greater scheduling flexibility by associating one or more custom scheduling policies with Lightning Scheduler flows. For example, you can create two scheduling policies with different appointment start time intervals. Then, customize your flow to invoke one or the other scheduling policy depending on the work type that users select when scheduling an appointment.

Run Lightning Scheduler Flows Without Worrying About User Permissions

Now you can set Lightning Scheduler flows to run in system context. Normally, how a flow is launched determines whether the flow runs in the context of the user or the system. Now you can bypass the running user's permissions by setting your flow to run in system context with sharing. The flow still respects org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories, but it ignores object permissions, field-level access, or other permissions of the running user.

Manage Customer Flow

With Queue Management, let customers join a digital wait-list and text them when it's their turn to enter.

Other Changes to Lightning Scheduler

Learn about other small but important improvements to Lightning Scheduler.

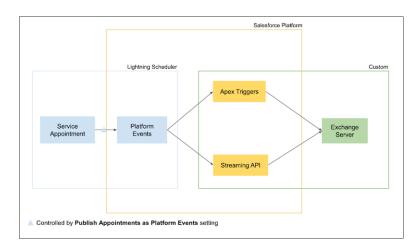
Write Lightning Scheduler Appointments Directly to External Calendars

We added a setting and developer resources to help you write Lightning Scheduler appointments directly to external calendars. When you enable the new Publish Appointments as Platform Events setting, Lightning Scheduler triggers platform events for new, modified, or deleted appointments. You can capture and write those events to external calendars using APIs.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

Why: This method is an alternative to using calendar sync tools, which let you synchronize your service resources' Salesforce calendars with external calendars. One of the benefits of using this method is that you can exercise greater control over the entire process.

How: Enable the Publish Appointments as Platform Events setting, and subscribe to the new AppointmentSchedulingEvent platform event to receive event notifications when users create, modify, or delete appointments. Use an API to write the platform events directly to an external calendar. For example, use Microsoft Graph REST API to publish the events to Microsoft Outlook®.



SEE ALSO:

Salesforce Release Notes: New and Changed Standard Platform Events

Salesforce Help: Write Lightning Scheduler Appointments to External Calendars (can be outdated or unavailable during release preview)

Platform Events Developer Guide: AppointmentSchedulingEvent (can be outdated or unavailable during release preview)

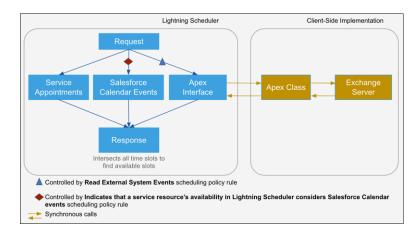
Check Resource Availability Directly from External Calendars

Now you can check external calendar events for service resource availability without synchronizing with the Salesforce calendar. Write an Apex class implementing the provided interface to check external calendar events for requested service resources and timelines and return the unavailable time slots. Lightning Scheduler excludes those time slots when showing the list of available time slots for those service resources.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

Why: This development-centric method is an alternative to using calendar sync tools, which let you synchronize your service resources' Salesforce calendars with external calendars. One of the benefits of using this method is that you can exercise greater control over the entire process.

How: Use the LxScheduler. Service Resource Schedule Handler Apex interface to write a custom Apex class to read external calendar events. Then, associate the Apex class with Lightning Scheduler flows or API calls through the Read External System Events scheduling policy rule.



SEE ALSO:

Salesforce Release Notes: LxScheduler Namespace

Salesforce Help: Check External Calendars to Determine Resource Availability (can be outdated or unavailable during release preview)

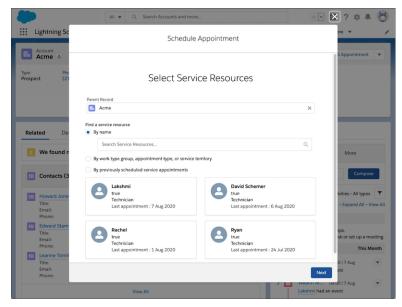
Apex Developer Guide: LxScheduler Namespace (can be outdated or unavailable during release preview)

Schedule Appointments in a Whole New Way

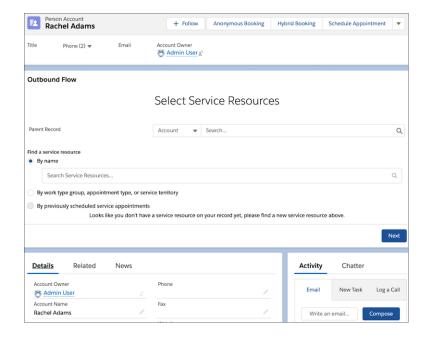
You can now embed Lightning Scheduler flows into record pages. Users can schedule, modify, or cancel appointments without launching the flow in a separate window over the record page, which blocks their access to details on the page.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

Why: When a user launches a Lightning Scheduler flow using a quick action, the flow opens in a separate window, blocking access to the underlying page.



However, when you embed the flow into a record page, it doesn't block the user's view of the page.



How: Edit an account, person account, opportunity, or lead page. Drag the Flow component on the page, and then select the Lightning Scheduler flow you want to add to the page.

SEE ALSO:

Salesforce Help: Add Lightning Scheduler Flows to Record Pages (can be outdated or unavailable during release preview)

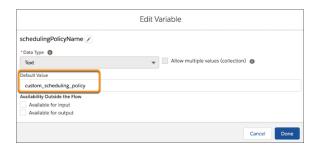
Use Custom Scheduling Policies with Lightning Scheduler Flows

Enjoy greater scheduling flexibility by associating one or more custom scheduling policies with Lightning Scheduler flows. For example, you can create two scheduling policies with different appointment start time intervals. Then, customize your flow to invoke one or the other scheduling policy depending on the work type that users select when scheduling an appointment.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

Why: Previously, all Lightning Scheduler flows used the provided Default Appointment Scheduling Policy. You could use custom scheduling policies only with Lightning Scheduler API calls.

How: Edit your Lightning Scheduler flow. In Flow Builder, on the Manager tab, edit the Scheduling Policy Name variable, and set its default value to the developer name of your custom scheduling policy.



To assign different scheduling policies to the SchedulingPolicyName variable at run time, add a decision element to your flow, and map it to multiple assignment elements.

SEE ALSO:

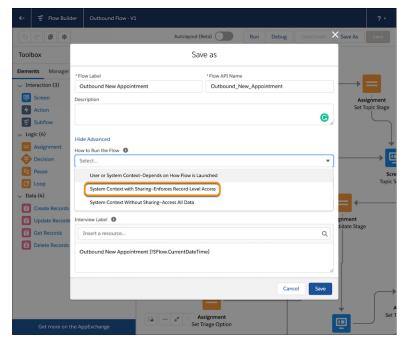
Salesforce Help: Create and Use Custom Scheduling Policies in Lightning Scheduler (can be outdated or unavailable during release preview)

Run Lightning Scheduler Flows Without Worrying About User Permissions

Now you can set Lightning Scheduler flows to run in system context. Normally, how a flow is launched determines whether the flow runs in the context of the user or the system. Now you can bypass the running user's permissions by setting your flow to run in system context with sharing. The flow still respects org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories, but it ignores object permissions, field-level access, or other permissions of the running user.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

How: When saving a flow, click **Show Advanced**. For How to Run the Flow, select *System Context with Sharing—Enforces Record—Level Access*.



To select this option for an existing flow version, use the settings icon.

Manage Customer Flow

With Queue Management, let customers join a digital wait-list and text them when it's their turn to enter.

Where: These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

How: To use Queue Management, assign the Facility Manager or Queue Manager permission set to users.

SEE ALSO:

Work.com Release Notes

Other Changes to Lightning Scheduler

Learn about other small but important improvements to Lightning Scheduler.

Where: These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

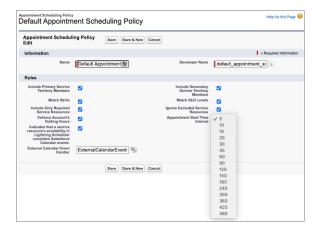
Why: We enhanced the appointment scheduling experience for users.

Let guest users schedule appointments on the go

The Inbound New Guest Appointment flow is now supported on mobile devices.

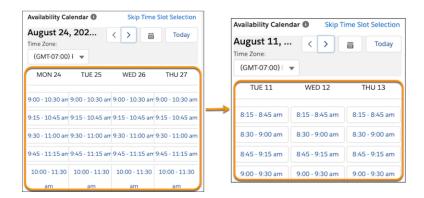
Define appointment time slots longer than an hour

The Appointment Start Time Interval scheduling policy rule has new values that let you define nonoverlapping time slots that are longer than 60 minutes. Previously, you could define nonoverlapping time slots of only up to 60 minutes.



Provide better user experience with a responsive time slot page

The number of days displayed on the time slot selection page varies depending on the screen size. This enhancement prevents the need for a horizontal scroll bar or overlapping time slot columns.



Prepare for the Microsoft Edge Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Microsoft Edge is changing the default cross-domain (SameSite) behavior of cookies. The SameSite changes are happening in the Chromium project, on which Microsoft Edge is based. This change enhances security and privacy, but requires customers and partners to test custom Salesforce integrations that rely on cookies. We support the ongoing effort to improve privacy and security across the web. We updated the SameSite attribute on cookies set by Salesforce. The fixes are in Winter '21 and they apply to Microsoft Edge 86 and later.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

When: This Microsoft Edge documentation indicates that the SameSite changes will coincide with the stable release of Edge 86 during the week of October 8, 2020. This change is happening in the Chromium project, on which Microsoft Edge is based. For Google's planned timeline for the SameSite changes, see the Chromium Project's SameSite Updates topic.

Salesforce is ready for the SameSite changes whenever the Chromium project rolls them out.

Who: This change applies to Salesforce users of Microsoft Edge 86 release or later.

Why: Note these important changes for Edge.

- Cookies don't work for non-secure (HTTP) browser access, including any community, portal, site, or Outlook or Gmail integration in your org. Use HTTPS instead.
- Some custom integrations that rely on cookies no longer work in Edge. This change particularly affects but isn't limited to cross-domain communication and integrations using iframes.

The SameSite attribute on a cookie controls its cross-domain behavior. This Chrome Platform Status explains the intent of the SameSite attribute.

"SameSite is a reasonably robust defense against some classes of cross-site request forgery (CSRF) attacks, but developers currently need to opt in to its protections by specifying a SameSite attribute. In other words, developers are vulnerable to CSRF attacks by default. This change would allow developers to be protected by default, while allowing sites that require state in cross-site requests to opt in to the status quo's less-secure model."

If no SameSite attribute is specified, the Edge 86 release sets cookies as SameSite=Lax by default. Until the Chrome 80 release, the default is SameSite=None. After the Edge 86 release, developers can still opt in to the status quo of unrestricted use by explicitly setting SameSite=None; Secure.

For more information, see this Chromium blog post.

How:

1. Use HTTPS instead of HTTP

To require HTTPS access in your org, ensure that the following Session Settings in Setup are enabled. These settings are enabled by default, but verify that HTTPS is required in your org.

Require secure connections (HTTPS)

Determines whether HTTPS is required to log in to or access Salesforce.

On May 1, 2020, we enforced the Require Secure HTTPS Connections critical update that required HTTPS connections to access Salesforce.

Require secure connections (HTTPS) for all third-party domains

Determines whether HTTPS is required for connecting to third-party domains.

If either of these settings is disabled, Edge users can experience disrupted functionality after the SameSite changes are live.

To require HTTPS access in communities, portals, or sites:

- **a.** From Setup, in the Quick Find box, enter *Sites* then select **Sites**.
- **b.** Click the site you want to edit, and ensure that the **Require Secure Connections (HTTPS)** checkbox is selected.

In Winter '21, we removed this setting because HTTP connections are no longer permitted for authenticated requests.

To check whether your Salesforce Classic Canvas connected app works with HTTPS:

- **a.** In Salesforce Classic, from Setup, in the Quick Find box, enter *Canvas App Previewer* then select **Canvas App Previewer**.
- **b.** Click the app that you want to check. If the app loads, it means that the URLs are already set to use HTTPS. If the app doesn't load in the previewer, update the Canvas App URL and Callback URL to use HTTPS.

To update your Canvas connected app to HTTPS:

- a. In Salesforce Classic, from Setup, enter Create, and then click Apps.
- **b.** Select the Canvas connected app that you want to update.
- c. In the Canvas App URL field, update the URL to use HTTPS.
- **d.** In the Callback URL field, update the URL to use HTTPS.
- e. Click Save.

f. Go back to the Canvas App Previewer and check that the app opens as expected.



Note: The first time that you navigate to the HTTPS URL, close and reopen tabs and clear your browser history.

Upgrade the LiveMessage Managed Package

Similar to other features, LiveMessage (Classic) requires that the Require Secure Connections (HTTPS) and Require secure connections (HTTPS) for all third-party domains Session Settings in Setup are enabled in your org.

The Edge 86 release is supported on version 4.46 or later of the managed package. If your org has an older version installed, upgrade to the latest version here.

2. Test custom Salesforce integrations that rely on cookies owned and set by your integration

Before the Edge 86 release, test any custom Salesforce integrations that rely on cookies owned and set by your integration. If you find any regressions, update the SameSite attribute on cookies used for cross-domain communication to explicitly set SameSite=None; Secure. If you set a cookie in Apex, use the new SameSite attribute of the Cookie () constructor method.

To test the effects of the SameSite behavior on your site or cookies before Edge rolls out these changes, navigate to edge: //flags. Enablethe "SameSite by default cookies" and "Cookies without SameSite must be secure" experiments. For more information, see this Chromium blog post. The fixes in Winter '21 apply to Edge 86 and later.



Note: As you test your cookies, consider what's the most secure SameSite value that works for each cookie. If a cookie is intended to be accessed only in a first-party context, you can apply SameSite=Lax or SameSite=Strict to prevent external access. Explicitly setting SameSite=Lax means that you're not relying on default browser behavior.

SEE ALSO:

Microsoft Edge: Site compatibility-impacting changes coming to Microsoft Edge

Chromium Project: SameSite Updates

Chromium Blog: Developers: Get Ready for New SameSite=None; Secure Cookie Settings

Chrome Platform Status: Cookies default to SameSite=Lax

Chrome Platform Status: Reject insecure SameSite=None cookies

web.dev: SameSite cookies explained

textslashplain.com: Same-Site Cookies By Default

ietf.org: Incrementally Better Cookies

Prepare for Firefox Changes in SameSite Cookie Behavior That Can Break Salesforce Integrations

Firefox is changing the default cross-domain (SameSite) behavior of cookies. This change enhances security and privacy but requires customers and partners to test custom Salesforce integrations that rely on cookies. We support the ongoing effort to improve privacy and security across the web. We updated the SameSite attribute on cookies set by Salesforce. The fixes are in Winter '21 and are ready for whenever Firefox rolls out the SameSite changes.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

When: This Mozilla Hacks blog post indicates that there's no timeline for releasing the SameSite changes to all users. Starting with Firefox 79 (June 2020), Mozilla rolled out the SameSite changes to 50% of its Firefox Beta users. Mozilla wants to first monitor the scope of any breakages as an indicator of whether sites have adapted to the new default behavior.

The changed SameSite behavior is live in Firefox Nightly since Nightly 75 (February 2020).

Salesforce is ready for the SameSite changes whenever Firefox rolls them out.

Who: This change applies to Salesforce users of Firefox.

Why: Note these important changes for Firefox.

- Cookies don't work for nonsecure (HTTP) browser access, including any community, portal, site, or Outlook or Gmail integration in your org. Use HTTPS instead.
- Some custom integrations that rely on cookies no longer work in Firefox. This change particularly affects but isn't limited to cross-domain communication and integrations using iframes.

The SameSite attribute on a cookie controls its cross-domain behavior. This Mozilla Hacks blog post explains the intent of the SameSite attribute changes.

"Currently, the absence of the SameSite attribute implies that cookies will be attached to any request for a given origin, no matter who initiated that request. This behavior is equivalent to setting SameSite=None. However, this "open by default" behavior leaves users vulnerable to Cross-Site Request Forgery (CSRF) attacks. In a CSRF attack, a malicious site attempts to use valid cookies from legitimate sites to carry out attacks."

If no SameSite attribute is specified, Firefox sets cookies as SameSite=Lax by default. In previous versions of Firefox, the default is SameSite=None. After this change, developers can still opt in to the status quo of unrestricted use by explicitly setting SameSite=None; Secure.

For more information, see this Mozilla Hacks blog post.

How:

1. Use HTTPS instead of HTTP

To require HTTPS access in your org, ensure that the following Session Settings in Setup are enabled. These settings are enabled by default, but verify that HTTPS is required in your org.

Require secure connections (HTTPS)

Determines whether HTTPS is required to log in to or access Salesforce.

On May 1, 2020, we enforced the Require Secure HTTPS Connections critical update that required HTTPS connections to access Salesforce.

Require secure connections (HTTPS) for all third-party domains

Determines whether HTTPS is required for connecting to third-party domains.

If either of these settings is disabled, Firefox users can experience disrupted functionality after the SameSite changes are live.

To require HTTPS access in communities, portals, or sites:

- a. From Setup, in the Quick Find box, enter Sites, then select Sites.
- b. Click the site you want to edit, and ensure that the **Require Secure Connections (HTTPS)** checkbox is selected.

In Winter '21, we removed this setting, because HTTP connections are no longer permitted for authenticated requests.

To check whether your Salesforce Classic Canvas connected app works with HTTPS:

- a. In Salesforce Classic, from Setup, in the Quick Find box, enter *Canvas App Previewer* then select **Canvas App**Previewer.
- **b.** Click the app that you want to check. If the app loads, it means that the URLs are already set to use HTTPS. If the app doesn't load in the previewer, update the Canvas App URL and Callback URL to use HTTPS.

To update your Canvas connected app to HTTPS:

- a. In Salesforce Classic, from Setup, enter Create, and then click Apps.
- **b.** Select the Canvas connected app that you want to update.

- c. In the Canvas App URL field, update the URL to use HTTPS.
- d. In the Callback URL field, update the URL to use HTTPS.
- e. Click Save.
- **f.** Go back to the Canvas App Previewer and check that the app opens as expected.
- Note: The first time that you navigate to the HTTPS URL, close and reopen tabs and clear your browser history.

Upgrade the LiveMessage Managed Package

Similar to other features, LiveMessage (Classic) requires that the Require Secure Connections (HTTPS) and Require secure connections (HTTPS) for all third-party domains Session Settings in Setup are enabled in your org.

The Firefox 82 release is supported on version 4.46 or later of the managed package. If your org has an older version installed, upgrade to the latest version here.

2. Test custom Salesforce integrations that rely on cookies owned and set by your integration

Before Firefox releases the SameSite changes for all users, test any custom Salesforce integrations that rely on cookies owned and set by your integration. If you find any regressions, update the SameSite attribute on cookies used for cross-domain communication to explicitly set SameSite=None; Secure. If you set a cookie in Apex, use the new SameSite attribute of the Cookie () constructor method.

This Mozilla Hacks blog post explains how to test the effects of the new Firefox behavior on your site or cookies before Firefox rolls out the SameSite changes. Navigate to about:config and type SameSite into the Search Preference Name bar. Set both network.cookie.sameSite.laxByDefault and network.cookie.sameSite.noneRequiresSecure to true. The fixes in Winter '21 apply to Firefox 82 and later.



Note: As you test your cookies, consider what's the most secure SameSite value that works for each cookie. If a cookie is intended to be accessed only in a first-party context, you can apply SameSite=Lax or SameSite=Strict to prevent external access. Explicitly setting SameSite=Lax means that you're not relying on default browser behavior.

SEE ALSO:

Mozilla Hacks Blog: Changes to SameSite Cookie Behavior – A Call to Action for Web Developers Mozilla Developer Network: SameSite Cookies and Common Warnings

Firefox Breakage Tracker: Breakage for cookie sameSite=lax by default

web.dev: SameSite cookies explained

textslashplain.com: Same-Site Cookies By Default

ietf.org: Incrementally Better Cookies

Do More with the Optimizer App

The Optimizer App now has even more capabilities to enhance your Salesforce org's implementation. Use two new features to schedule automatic runs and view org metric history and access seven new metrics to improve security.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Users must have the Customize Application, Modify All Data, and Manage Users user permissions to access the Optimizer App.

Why: We added two new features:

• **Schedule Run**: Save yourself time by setting the Optimizer App to automatically run once a month, behind the scenes.

• **Org Metric History:** Get a high-level overview of how actions have affected the limits on your org's file storage, static resources, and data storage.

We also added seven new metrics to help evaluate and give expert recommendations on the security of your org. Ensure that your Salesforce org's data is secure by following security configuration best practices.

- Profile Assignments
- Critical Permission Assignments
- Release Updates Pending Review
- Insecure Community Sharing Settings
- Insecure Default External Access Levels
- Sharing Rules for All External Users
- Public Groups and Queues with Guest Users

How: From Setup, in the Quick Find box, enter *Optimizer*, then select **Optimizer**.

See More Record Info in Highlights Panels

Hovering over a lookup relationship field on a record page displays the first seven fields from the compact layout in a highlights panel. Previously, the highlights panel displayed only the first five fields.

Where: This change applies to Lightning Experience in all editions.

SEE ALSO:

Salesforce Help: Compact Layouts (can be outdated or unavailable during release preview)

UI Changes for Lightning Web Components

To enhance usability and performance, some components were switched from Aura components to Lightning Web Components (LWC). Custom objects, some standard objects, and some UI elements like related lists were updated to LWC. There should be no reductions in functionality, but you might notice some minor UI differences.

Where: This change applies to Lightning Experience in all editions.

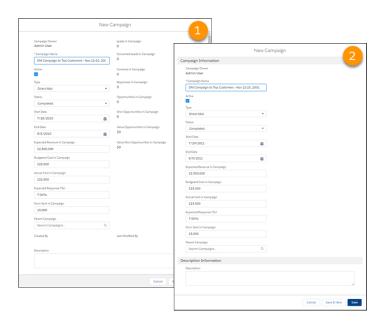
How: For example, custom objects now use Lightning Web Components when showing or editing fields. The functionality is the same, with the added benefit of highlighting changed fields and undoing field changes while editing. Errors in forms and detail pages also appear in the footer instead of on the top of the page.

UI Changes for Cloning Records

The clone records interface now ensures that the correct record details appear. Previously, the clone records dialog also showed read-only fields relevant only to the original record whose values aren't actually cloned to the new record. Also, when using console navigation, the clone action now opens in a subtab instead of a dialog.

Where: This change applies to Lightning Experience in all editions.

How: This image shows the clone dialog before (1) and after (2). Along with a slightly updated look, records now show only the fields relevant to the cloning process.



Recycle Bin Search Capability Is Being Removed

To avoid performance issues, we removed the search functionality from the Recycle Bin.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: The Recycle Bin is a list view that allows you to sort and filter to find the records you need.

SEE ALSO:

New and Changed Objects

Salesforce Help: Manage the Recycle Bin in Lightning Experience (can be outdated or unavailable during release preview)

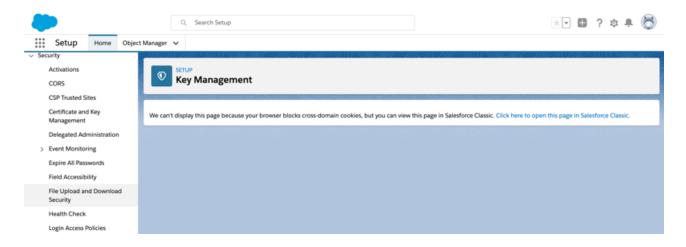
Salesforce Help: View and Restore Your Recycle Bin in Lightning Experience (can be outdated or unavailable during release preview)

Access Setup and Visualforce Pages in Apple® Safari

To protect user privacy, the Prevent Cross-Site Tracking privacy setting is enabled by default in Apple Safari version 13.1 and later. This setting prevents some Setup and Visualforce pages from displaying properly. On the affected Setup pages, a new on-screen message and link allow you to access the page's content by reloading the page in Salesforce Classic. For Visualforce pages, you can change some org metadata so that those pages display properly.

Where: This change applies to Lightning Experience in all editions.

How: Salesforce is actively working on updating these pages so that they display correctly. In the meantime, we've added this message to the affected Setup pages: "We can't display this page because your browser blocks cross-domain cookies, but you can view this page in Salesforce Classic." Click the link in the message to reload the page in Classic.



To display content for Visualforce pages, follow the steps in the Cannot Load Images and Other Content When Using Safari knowledge article to change your org's metadata.



- Company Settings > My Domain
- Company Settings > Fiscal Year
- Security > Session Settings

To access these pages, in the Lightning Experience header, click the profile picture and select **Switch to Salesforce Classic**.

Cisco Webex Is Being Retired

Cisco Webex is scheduled to be retired starting on October 9, 2020, as part of the Winter '21 release.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Knowledge Article: Cisco Webex Retirement

Skype Is Being Retired

Skype is scheduled to be retired starting on October 9, 2020, as part of the Winter '21 release.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Knowledge Article: Skype For Salesforce Retirement

Keep Working with Tab-Focused Dialogs (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation in Winter '21, but has been postponed to Winter '22. In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it.

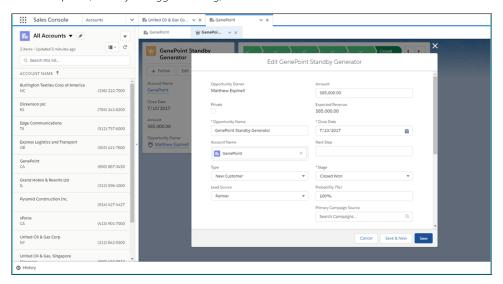
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

When: You can activate this update now. Otherwise, we auto-activate it in Winter '22.

Why: Before the Winter '20 release, all dialogs triggered by a workspace tab or subtab in a Lightning console app took the focus of the entire app. This update makes dialogs require the focus of only the tab that triggered them, allowing users to interact with the rest of the app.

How: To activate this release update before October 19, 2020, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Keep Working with Tab-Focused Dialogs, click **Activate**.

After the update, when you trigger a dialog, it's limited to the tab that created it.



SEE ALSO:

Release Updates

Reopen Business Transparently with Digital Trust Cards

Show your customers how you keep them safe as your business reopens during COVID. Digital Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a trust card for each of your business locations, and publish them on your website. Each trust card displays trust measures or COVID safety protocols that your business follows.

Where: Trust cards are available in Lightning Experience in Enterprise, Unlimited, and Performance editions

Who: Hotels, retail stores, and entertainment venues are just some of the customer-facing businesses that can benefit from posting a trust card to their website. Your admin adds the trust card code snippet to your website, assigns the Trust Card Manager permission set to location managers, and creates locations for each customer-facing business. To publish trust measures and create a single location's trust card, you must have the Trust Card Manager permission set. Trust measures reflect local and national governmental guidance for safe reopening during COVID.

To learn more, visit the Work.com Release Notes.

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

See the Work.com release notes for the latest updates: Work.com Release Notes

Service: Service Cloud Voice Streamlined Setup, Omni-Channel Supervisor for Calls, Einstein Bots Templates, and More

Get started with Service Cloud Voice using a streamlined setup, support for Sales Cloud, the Voice API Toolkit (generally available), and more. Let Omni-Channel supervisors view calls as they happen to improve training and onboarding. Build your Einstein Bot faster with a new guided template and strengthen intent models with Input Recommender (beta). Field Service Time Sheets let you track your employees' hours right inside your field service solution. Accelerate your customer service configuration with easy setup and built-in best practices. Learn about these and other new Service Cloud features.

IN THIS SECTION:

Einstein for Service: Bot Building from a Template, Faster Case Classification Recommendations, and More

Get started faster with a fully loaded bot from a template in Guided Setup. In both versions of Einstein Case Classification, recommendations now appear when a case is created. All Lightning Knowledge users now see Einstein Article Recommendations in the Lightning Service Console. Agents can dock, or pin, the Einstein Replies component to send recommended replies from any console subtab. Input Recommender empowers bot admins to find utterances in your chat data to build stronger intent models. Expand your global reach with new language support for Reply Recommendations and Einstein Bots.

Field Service: A New Name, Time Sheets Everywhere, and Complex Preventive Maintenance Scheduling

Take advantage of new features under the renamed Field Service umbrella. Let your workers submit time sheets, now generally available, from the field service mobile app and include local time zones. Recurrent patterns let you define the right cadence for periodic maintenance appointments.

Service Setup Assistant: Go from Zero to Console in Minutes

Get started with Service Cloud faster than ever. The out-of-the-box setup assistant does the heavy lifting—link your support email and add your team members. This process sets up everything you need to start resolving cases the same day: the Lightning Service Console App, custom profiles, Email to Case, queues, and the case Lightning record page. We also add prebuilt Quick Text, macros, and Lightning Flows to streamline your workflow.

Channels: Voice Setup with Amazon Connect for Sales, Messaging Templates, and Channel Menu Code Settings

Bring the power of integrated telephony to your sales and support organizations with faster Service Cloud Voice setup. Increase agent productivity with the Voice toolkit API, automation, collaboration tools, and usability improvements. Build Messaging templates with more flexibility using Lead and Opportunity records. Customize your Channel Menu with Code Settings and avoid tangling with HTML on your web pages.

Knowledge: Enhancements to Sharing, Article Linking

Use standard sharing for Knowledge with Guest Users and High-Volume Community Users, change ownership of multiple articles at once, and track article ownership. Use Linked Articles with Voice and Related Lists with Voice, Chat, Messaging, and Social Post.

Routing: Supervisor Monitoring for Voice, Supervisor Configuration (Generally Available), Name Changes, Skills-Based Routing for Chat and Messaging

Enable service supervisors to assist agents in real time with the latest Omni-Channel Supervisor enhancements. Supervisors can view voice transcripts as the phone call is in progress so they can jump in and help agents when needed. Control which agents supervisors see with Supervisor Configurations. Attribute Setup for Skills-Based Routing is renamed and is now available for Chat and Messaging.

Case Management: Productivity Tools and Email-to-Case Threading

New prebuilt macros, quick text, and flows help enhance agent productivity and get them doing better work, faster than ever before. Email-to-Case threading behavior update boosts security by matching incoming emails with their header information instead of through a Ref ID.

Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

Einstein for Service: Bot Building from a Template, Faster Case Classification Recommendations, and More

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IN THIS SECTION:

Einstein Bots: Everyone Can Bot with Intro Template, Intent Model Enhancements, and New Permissions

This Einstein Bots release is all about bringing more bots to more people. Get started with Bots faster by creating a bot from a template in Guided Setup. Build robust intent models with Input Recommender, and invite more team members to build and manage your intent model with enhanced permissions. We're adding three new languages and innovative accessibility features to Map View. And you can add custom context variables to your bot to capture important incoming information about your customers.

Einstein Case Classification: Faster Recommendations, Optional Controlling Fields, and Auto-Update Insights

If you're using the Try Einstein version of Einstein Case Classification, field value recommendations now appear right after the case is created rather than hourly. Controlling fields are optional so model setup goes smoothly. And you get details to help you resolve issues with automatic case updates.

Einstein Reply Recommendations: New Flexible Format and Multi-Language Support

Work more nimbly in the Lightning Service Console by docking the Einstein Replies component, which lets agents review and send recommended replies while reviewing other records. Extend your global reach with reply recommendations in eight new languages.

Einstein Article Recommendations: Easier Agent Access and a New Data Check

No more fiddling with user permissions—all Lightning Knowledge users now see Einstein Article Recommendations in the Lightning Service Console. Einstein now identifies data quality issues that can affect article recommendations.

Einstein Bots: Everyone Can Bot with Intro Template, Intent Model Enhancements, and New Permissions

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IN THIS SECTION:

Jumpstart Bot Building with Bots Guided Setup Updates

The Guided Setup Flow updates help new and experienced bot builders. New builders can create a bot from a template that includes popular Salesforce actions such as create a case, create a lead, add a case comment, or look up an order. This bot also includes optimized conversational text and flows so you can customize it and go live faster. Experienced builders can use this flow to quickly spin up a bot from scratch for fast customization.

Strengthen Your Intent Model with Input Recommender (Beta)

Build your intent model in record time with Input Recommender. Use recommendations within new or existing dialog intents to build realistic training data that's based on phrases your customers already use. You can use Input Recommender to generate lots of utterances for a new intent or to increase the quality of your existing intents by recommending high-value utterances.

Make Bot Development a Team Effort with Enhanced Permissions

Share bot development with multiple stakeholders while keeping your data secure. Users with View Setup and Configuration can access the bot in read-only mode. The Manage Bots permission allows you to build and maintain bots while Manage Bots Training Data gives access to intent sets and training activities. These updates help you maintain your bot's intent model across a broad team while keeping bot development to a select few.

Find Your Way with New Map View Accessibility Features (Generally Available)

Map View is even more accessible to bot admins thanks to a new location-based framework for screen readers. When you select a dialog, screen readers describe the child elements and identify whether Einstein is enabled. Admins can use the robust keyboard navigation tools in Map View to visually navigate bots.

Get Even More Languages for Einstein Bots

Bots' language capabilities are better than ever! Japanese, Chinese Traditional, and Chinese Simplified are now generally available, and Russian, Dutch, and Brazilian Portuguese are now beta languages.

Get Specific with Custom Context Variables Mapping

Help your bot act on incoming context from your customer by mapping custom context variables. Chat admins can customize the prechat form to deliver information to the bot, and Messaging admins can capture phone numbers to link to existing records. Every custom context variable can map to multiple channels and fields.

Gain Deeper Insights with Enhanced Bot Session Metrics

Get even more enhancements for bot metrics so you can share insights with your team. The event logs show when a bot transfers to an agent or another bot. And the logs call out each rule action. Rule elements with conditions are now specified as unique events.

Einstein Bots: Session Timeout Updates

Bot sessions timeout limits now vary by channel. The Chat channel timeout is 30 minutes and the Messaging channel timeout is 8 hours.

Routing Was Updated for Einstein Bots

End users interacting with Einstein Bots and Chat can now view their place in line in the chat window. Einstein Bots using queue-based routing and skills-based routing now support queue position for overrides.

Bot Options Menu Behavior Was Changed

Einstein Bots now delivers a consistent transfer experience across all functions. The automatic Transfer to Agent option is no longer provided by default for bots without dialogs assigned to the Bot Options Menu. To offer a transfer option, admins can add the Transfer to Agent dialog to the Bot Options Menu. If the Bot Options Menu is enabled in and before Winter '21, admins must complete the instructions given in Release Updates to migrate to the new behavior. In Spring '21, the Bot Options Menu defaults to the new behavior.

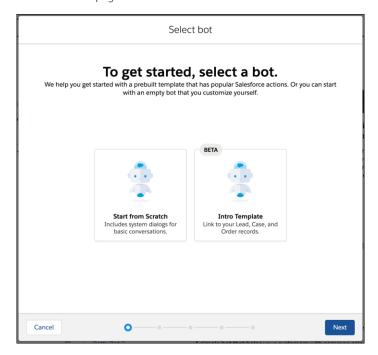
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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Who: Einstein Bots is available to Salesforce orgs with both Service Cloud and Chat user licenses, or to orgs with Digital Engagement user licenses. Each applicable org is provided with 25 Einstein Bots conversations per month for each Chat or Digital Engagement user with an active subscription. This feature requires the following permissions: Customize Application OR Modify Metadata OR Manage Bots. To create a bot using the Intro Template, customers must have Messaging and Chat enabled in their org.

How: New bot users can click Create a New Bot on the Bot main page to launch Guided Setup. Users with existing bots can click New on the Bot main page.



Strengthen Your Intent Model with Input Recommender (Beta)

Build your intent model in record time with Input Recommender. Use recommendations within new or existing dialog intents to build realistic training data that's based on phrases your customers already use. You can use Input Recommender to generate lots of utterances for a new intent or to increase the quality of your existing intents by recommending high-value utterances.

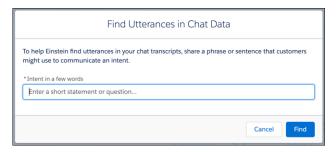
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How: You can activate Input Recommender on the Einstein Bots Main page. To launch Input Recommender, click Get Recommendations from a new intent or click Find Similar next to any utterance.

To enable Input Recommender, your profile must have View All access on the Chat Transcript object. Input Recommender requires at least 10,000 Chat Transcript records to build a high-quality model.

Any use of this beta feature is subject to the Beta Services terms.



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How: Manage Bots and Manage Bots Training Data are custom permissions in permission sets that can be assigned to a profile. Learn more about how to assign permission sets with this help article.

Find Your Way with New Map View Accessibility Features (Generally Available)

Map View is even more accessible to bot admins thanks to a new location-based framework for screen readers. When you select a dialog, screen readers describe the child elements and identify whether Einstein is enabled. Admins can use the robust keyboard navigation tools in Map View to visually navigate bots.

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How: You can access Map View on the Dialog Page in the Bot Builder.

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How: Setting a language for the bot is required. You can select a language for a new bot during the New Bot Setup Flow. You can assign a language to previously created bots by editing the Bot Information section of the Bot Overview page.

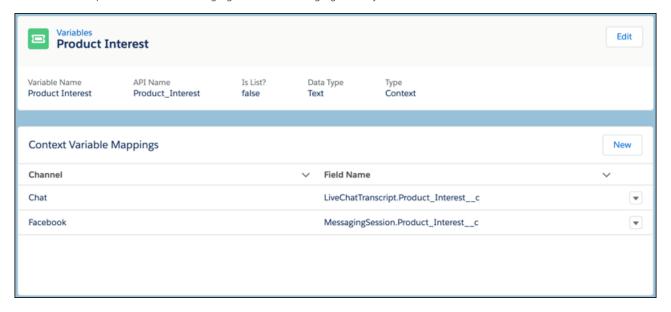
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How: To make a new variable, click New in the Variables page of the Bot Builder. Change the Type field to Context. Save your work and then click the Variable name to add mappings per channel. The Chat channel can map to the LiveChatTranscript object and the Messaging Channels can map from either the MessagingSession or MessagingUser objects.



Gain Deeper Insights with Enhanced Bot Session Metrics

Get even more enhancements for bot metrics so you can share insights with your team. The event logs show when a bot transfers to an agent or another bot. And the logs call out each rule action. Rule elements with conditions are now specified as unique events.

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with an active subscription. This feature requires the following permissions: Customize Application OR Modify Metadata OR Manage Bots.

How: You can access the Event Logs on the Performance tab within the Bot Builder. Reports on transfers use the new field on the ConversationDefinitionSession object: Session Transfer Target Type.

Einstein Bots: Session Timeout Updates

Bot sessions timeout limits now vary by channel. The Chat channel timeout is 30 minutes and the Messaging channel timeout is 8 hours.

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Bot Options Menu Behavior Was Changed

Einstein Bots now delivers a consistent transfer experience across all functions. The automatic Transfer to Agent option is no longer provided by default for bots without dialogs assigned to the Bot Options Menu. To offer a transfer option, admins can add the Transfer to Agent dialog to the Bot Options Menu. If the Bot Options Menu is enabled in and before Winter '21, admins must complete the instructions given in Release Updates to migrate to the new behavior. In Spring '21, the Bot Options Menu defaults to the new behavior.

Einstein Case Classification: Faster Recommendations, Optional Controlling Fields, and Auto-Update Insights

If you're using the Try Einstein version of Einstein Case Classification, field value recommendations now appear right after the case is created rather than hourly. Controlling fields are optional so model setup goes smoothly. And you get details to help you resolve issues with automatic case updates.

IN THIS SECTION:

Try Einstein, Now with Faster Recommendations

We know that every minute counts. If you have the Try Einstein version of Einstein Case Classification, Einstein now recommends field values just once to the agent, right after the case is created. Previously, recommendations were refreshed hourly on all open and updated cases, which meant that they weren't always available when a case was created.

Controlling Fields Are Optional

A controlling field determines which values are available in another field, known as the dependent field. If you want Einstein Case Classification to predict a dependent field, you can now activate your model without including the controlling field.

Get Insight into Auto-Update Issues

If Einstein Case Classification tries and fails to update a case field, we tell you the reason for the failure so you can fix it.

Learn More with Prediction Fields in Einstein Case Classification

Pinpoint the field for which Einstein Case Classification is making predictions. Previously, you could get recommendations for cases but couldn't identify the related field. You can use the prediction field, for example, to build reports that compare predictions to actual case values.

Try Einstein, Now with Faster Recommendations

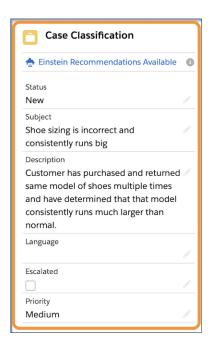
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Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for Einstein Case Classification is available only in Lightning Experience.

Who: The Try Einstein version of Einstein Case Classification doesn't require the Service Cloud Einstein add-on license.

How: To view Einstein's recommendations on a case, click **Get Einstein Recommendations** in the Lightning Service Console. Depending on how you set up Einstein Case Classification, this link appears in:

- The Case Details related record component, or
- The Einstein Field Recommendations component, whose standard header is Case Classification



Recommendations typically appear right after after the case is created, though there can be a slight delay during high-traffic times. You may need to refresh the page to see them.

Controlling Fields Are Optional

A controlling field determines which values are available in another field, known as the dependent field. If you want Einstein Case Classification to predict a dependent field, you can now activate your model without including the controlling field.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for Einstein Case Classification is available only in Lightning Experience.

Why: For example, suppose the Reason case field is dependent on the Case Source field. You add Reason to your model so Einstein can predict it, but Case Source isn't supported in Einstein Case Classification. You can now activate your model without removing Reason.

Including the controlling field in your model gives Einstein context for predictions. However, don't worry if it's not available to add—Einstein still predicts the dependent field. If Einstein's predicted value for the dependent field isn't compatible with the controlling field's value on a case, the prediction is hidden to preserve data quality.

SEE ALSO:

Salesforce Help: Considerations for Choosing Fields to Predict (can be outdated or unavailable during release preview)

Get Insight into Auto-Update Issues

If Einstein Case Classification tries and fails to update a case field, we tell you the reason for the failure so you can fix it.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for Einstein Case Classification is available only in Lightning Experience.

Why: When Automate Value is selected on a field in your model, Einstein Case Classification automatically updates the field on a case as long as the prediction is above your confidence threshold. Previously, if a case that met these requirements wasn't auto-updated, it wasn't clear why. Now, the new Error Code picklist field on the AlUpdateRecordEvent platform event tells you why an automatic update wasn't completed. The field has these values, which can't be customized:

- none—No error occurred.
- entity_locked—The case is locked for editing by an approval process.
- no_access—The selected Einstein user or automatic process user doesn't have permission to update the case.
- validation_rule—The update violates a case validation rule.
- other—A different error occurred.

How: Use the new field to catch and troubleshoot any auto-update failures. For example, create a process or flow to add cases to a queue for review if their Error Code isn't equal to none.

SEE ALSO:

Salesforce Help: AlUpdateRecordEvent (can be outdated or unavailable during release preview)

Learn More with Prediction Fields in Einstein Case Classification

Pinpoint the field for which Einstein Case Classification is making predictions. Previously, you could get recommendations for cases but couldn't identify the related field. You can use the prediction field, for example, to build reports that compare predictions to actual case values.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for Einstein Case Classification is available only in Lightning Experience.

Who: The Try Einstein version of Einstein Case Classification doesn't require the Service Cloud Einstein add-on license.

How: Use the new PredictionField on the AlRecordInsight object to identify the field for your insights. To include PredictionField in custom report types, add it to the report layout on the Report Types page in Setup.

Einstein Reply Recommendations: New Flexible Format and Multi-Language Support

Work more nimbly in the Lightning Service Console by docking the Einstein Replies component, which lets agents review and send recommended replies while reviewing other records. Extend your global reach with reply recommendations in eight new languages.

IN THIS SECTION:

Keep the Conversation Going with the New Docked Format

Dock, or pin, the Einstein Replies component to send replies from any subtab in the Lightning Service Console. When the component is docked, it shows replies for the current tab's open chat or messaging session. Agents can minimize and expand it while they scan records related to the conversation.

Expand Your Global Reach with Reply Recommendations in Eight Languages (Pilot)

Einstein Reply Recommendations suggests common replies to support agents during chat and messaging sessions. The reply recommendations are based on past chat transcripts, and come from a list of replies generated by Einstein and approved by you. The feature was previously available only in English. Reply recommendations in French, Dutch, German, Spanish, Italian, Danish, Swedish, and Turkish are now in pilot.

Keep the Conversation Going with the New Docked Format

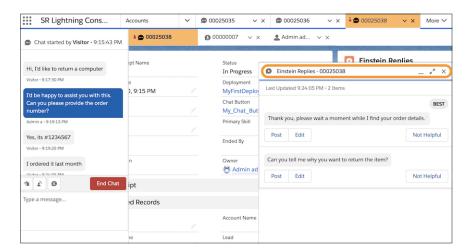
Dock, or pin, the Einstein Replies component to send replies from any subtab in the Lightning Service Console. When the component is docked, it shows replies for the current tab's open chat or messaging session. Agents can minimize and expand it while they scan records related to the conversation.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: The dock option is automatically available to all agents who can see the Einstein Replies component. Click the top-right icon to dock the component.



Use the header bar actions to minimize, maximize, or close the docked component. The header bar also shows the transcript number of the open chat or messaging session for the current console tab.



Agents can interact with recommended replies even if the conversation isn't visible from their current subtab. For example, click **Post** or **Not Helpful** on a recommended reply while scanning a related knowledge article. Clicking **Edit** pastes the reply into the conversation's message field for editing, but keeps the focus on the current subtab. The agent can then navigate to the conversation to polish and post the reply.



Note: You can choose to shift focus to the active conversation when users click **Edit** on replies in docked mode. Open the Chat or Messaging console pages in the Lightning App Builder. Then, click the Einstein Replies component and select **Go to active conversation for docked edits**.

SEE ALSO:

Salesforce Help: Use Reply Recommendations in the Lightning Service Console (can be outdated or unavailable during release preview)
Salesforce Help: Give Agents Access to Reply Recommendations (can be outdated or unavailable during release preview)

Expand Your Global Reach with Reply Recommendations in Eight Languages (Pilot)

Einstein Reply Recommendations suggests common replies to support agents during chat and messaging sessions. The reply recommendations are based on past chat transcripts, and come from a list of replies generated by Einstein and approved by you. The feature was previously available only in English. Reply recommendations in French, Dutch, German, Spanish, Italian, Danish, Swedish, and Turkish are now in pilot.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: To learn about the Einstein Reply Recommendations multi-language pilot, contact your Salesforce Account Executive. The pilot is available for orgs in which the majority of chat transcripts are in a non-English pilot language. For example, if 90% of your closed chat transcripts are in French, you can join the pilot for French reply recommendations. The pilot isn't available for orgs already using Einstein Reply Recommendations in English.

To deliver reply recommendations in your majority language, Einstein needs to analyze at least 10,000 closed chat transcripts in that language. If you don't have enough closed chats or if the chats are too short, we let you know when you try to build your predictive model.

Einstein Article Recommendations: Easier Agent Access and a New Data Check

No more fiddling with user permissions—all Lightning Knowledge users now see Einstein Article Recommendations in the Lightning Service Console. Einstein now identifies data quality issues that can affect article recommendations.

IN THIS SECTION:

Show Einstein Article Recommendations to Lightning Knowledge Users (Update)

All Lightning Knowledge users now see Einstein Article Recommendations in the Knowledge component. Previously, users needed a user permission to see article recommendations.

Find and Fix Data Flaws Earlier

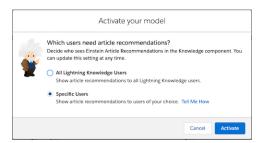
Without good, plentiful data to learn from, Einstein can't make accurate article recommendations. You now are notified if you don't have enough high-quality data to activate your Einstein Article Recommendations model. And you get tips to help you fix the issue.

Show Einstein Article Recommendations to Lightning Knowledge Users (Update)

All Lightning Knowledge users now see Einstein Article Recommendations in the Knowledge component. Previously, users needed a user permission to see article recommendations.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: If you haven't yet set up Einstein Article Recommendations, you're prompted to indicate your user access preference when you activate your model.



Choose between two options:

- **All Lightning Knowledge Users:** This option is selected for you so you no longer need to manually manage user permission assignment. If your Einstein Article Recommendations model is already active, some users may see article recommendations for the first time.
- **Specific Users:** Select this option to use the View and Act On Einstein Article Recommendations user permission to control access to article recommendations.

Update the new setting at any time from the Einstein Article Recommendations page in Setup.

SEE ALSO:

Salesforce Help: Give Agents Access to Einstein Article Recommendations (can be outdated or unavailable during release preview)
Salesforce Help: Einstein Article Recommendations FAQ (can be outdated or unavailable during release preview)

Find and Fix Data Flaws Farlier

Without good, plentiful data to learn from, Einstein can't make accurate article recommendations. You now are notified if you don't have enough high-quality data to activate your Einstein Article Recommendations model. And you get tips to help you fix the issue.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: After you build your model, you're notified if your cases and articles don't contain enough high-quality data to allow model activation. Too many blank, incomplete, or improperly filled out fields in your cases can cause this data warning.

The warning tells you how often the fields included in your model were left blank. Use this information as a starting point to conduct a quality review of your knowledge base and recent cases. Or, boost your model's data quality by choosing different case and knowledge fields for Einstein to learn from. Then rebuild and activate your model.

Field Service: A New Name, Time Sheets Everywhere, and Complex Preventive Maintenance Scheduling

Take advantage of new features under the renamed Field Service umbrella. Let your workers submit time sheets, now generally available, from the field service mobile app and include local time zones. Recurrent patterns let you define the right cadence for periodic maintenance appointments.

IN THIS SECTION:

Field Service Has a New Name

It's still lightning-fast, but Field Service Lightning is now Field Service. Field names, messages, and Salesforce Help reflect the new name. The API namespace, developer field names, permission sets, and custom permissions don't change, so there's no need to worry about updates to your custom code.

Keep Track of Time on the Job with Time Sheets (Generally Available)

Gain visibility into the hours that your mobile employees are working. Let managers create, review, and take action on employee time sheets. Define templates so that you can generate time sheets automatically.

Record Product Warranties

Give your mobile workers access to product warranty details so that they can start claims for faulty products. Record details of warranty terms and assign them to products or product families to create standard warranties. Then create assets and, in addition to the standard warranty, enter additional or extended warranties along with exclusions and void terms.

Improve Preventive Maintenance with Advanced Recurrence (Beta)

Keep assets in tip-top shape by managing maintenance that runs on different schedules. Define maintenance schedules with recurrent rules and specify the precedence of each schedule. Then, let the work orders generated guide your field service technicians to perform the right maintenance at the right time.

Get the Total Price on Service Contract Line Items

No need to get out the calculator. You can now see the total price of all line items for a service contract.

Find the Right Previous Business Day with BusinessHours.add

When you want to find the previous business day using BusinessHours.add, the returned datetime now accounts for a holiday before a day with no business hours. For example, where a Friday is taken as a holiday when Saturday has no business hours the previous business day is now correctly returned as Thursday.

Get Translated Work Order Subjects

It's easier to communicate with mobile workers in their own language. In the subject of work orders that are generated from maintenance plans, the word maintenance translates correctly into Salesforce-supported languages.

Field Service Scheduling: Street-Level Routing and Prioritized Appointments

Predict more accurate travel times with street-level routing. Let scheduling and optimization assign high-priority appointments to time slots and overlap less urgent visits.

Field Service Mobile: Time Sheets, Notification Enhancements, and Actions Launcher Parity

Workers can get more done in the Field Service mobile app. They can submit past and present time sheets, send relevant notifications, and see when new messages arrive. Actions launcher parity between Android and iOS makes it easier for teams on both platforms to use the app.

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Where: This feature applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

Keep Track of Time on the Job with Time Sheets (Generally Available)

Gain visibility into the hours that your mobile employees are working. Let managers create, review, and take action on employee time sheets. Define templates so that you can generate time sheets automatically.

Where: This feature applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Get Started with Time Sheets (can be outdated or unavailable during release preview)

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Where: This change applies to Lightning Experience, and Salesforce Classic, and the Salesforce mobile app for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Record Product Warranties (can be outdated or unavailable during release preview)

Improve Preventive Maintenance with Advanced Recurrence (Beta)

Keep assets in tip-top shape by managing maintenance that runs on different schedules. Define maintenance schedules with recurrent rules and specify the precedence of each schedule. Then, let the work orders generated guide your field service technicians to perform the right maintenance at the right time.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

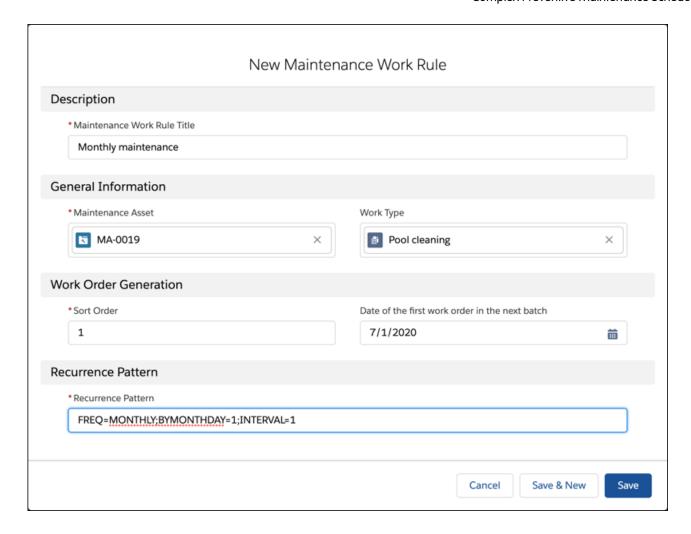
As a beta feature, Maintenance Plan Advanced Recurrence is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

Why: Assets can have requirements for multiple maintenance schedules, with each schedule at different frequencies. When maintenance tasks coincide, you may want to do them all or perform only some.

For example, a building maintenance company performs minor maintenance on an air conditioning system every 3 months and a major service annually. When a work order is generated for annual service, the service manager doesn't want a work order generated for 3-month service.

Or, consider, a pool maintenance company that cleans a pool monthly and applies a chemical treatment every 3 months. In this case, when the treatment work order is created, the service manager wants the pool cleaning work order too.

How: Create a maintenance work rule for an asset, and use sort order to set precedence for multiple rules. When the work order generation process finds several rules to generate on the same day, only work orders for the rules with the lowest sort order value are generated. If there are rules with the same sort order, each rule generates a work order.



SEE ALSO:

Salesforce Help: Maintenance Plan Advanced Recurrence (Beta) (can be outdated or unavailable during release preview)

Get the Total Price on Service Contract Line Items

No need to get out the calculator. You can now see the total price of all line items for a service contract.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Find the Right Previous Business Day with BusinessHours.add

When you want to find the previous business day using BusinessHours.add, the returned datetime now accounts for a holiday before a day with no business hours. For example, where a Friday is taken as a holiday when Saturday has no business hours the previous business day is now correctly returned as Thursday.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

BusinessHours.add for a negative value doesn't work as expected when a one time holiday falls before a day with no business hours

Get Translated Work Order Subjects

It's easier to communicate with mobile workers in their own language. In the subject of work orders that are generated from maintenance plans, the word maintenance translates correctly into Salesforce-supported languages.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Field Service Scheduling: Street-Level Routing and Prioritized Appointments

Predict more accurate travel times with street-level routing. Let scheduling and optimization assign high-priority appointments to time slots and overlap less urgent visits.

IN THIS SECTION:

Estimate Travel Times with Street-Level Routing (Generally Available)

Because street-level routing (SLR) uses actual road speeds and turn-by-turn data, it calculates travel times more precisely than aerial routing. More accurate travel projections can help your workers be more productive and drive less.

Target Work Priorities Using Service Appointments

When your team's availability is limited, prioritize urgent service appointments over less pressing jobs. You can assign priority values directly to appointments. Previously, you could specify them only on parent work orders or work order line items.

Shape Up with New Tests in Health Check

Keep your field service configuration healthy. Added tests help you detect if a service territory lacks resources with the needed skills or whether an arrival window occurs after an appointment's due date. Also, one click can tell you if street-level routing (SLR) is set up properly.

Offload Sandbox Services for Routing and Optimization

Configure your Salesforce sandbox orgs to use independent remote sites for street-level routing (SLR) and optimization services. To keep your production orgs running smoothly, we added dedicated remote sites for sandboxes. In a future release, we'll require sandboxes to use these sites for SLR and optimization services.

Estimate Travel Times with Street-Level Routing (Generally Available)

Because street-level routing (SLR) uses actual road speeds and turn-by-turn data, it calculates travel times more precisely than aerial routing. More accurate travel projections can help your workers be more productive and drive less.

Where: This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service managed package installed.

How: In the Field Service Admin app, turn on street-level routing in **Field Service Settings** > **Scheduling** > **Routing**. SLR calculations take a bit longer than aerial routing.

SEE ALSO:

Salesforce Help: Set Up Routing for Travel Time Calculations (can be outdated or unavailable during release preview)

Target Work Priorities Using Service Appointments

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Where: This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service managed package installed.

Why: Use a custom formula to assign priority values. For example, create a priority field that's based on appointment due dates. When there's no available time slot and the due date is near, optimization bumps appointments with lower priorities. Scheduling gives precedence to high priority appointments and overlaps lower priority assignments.

How: Select a priority field on service appointments, work orders, or work order line items. Default priorities range from 1, the most critical, to 10, the least urgent. If you need small increments between priority values, use the optional range of 1–100. After scheduling or optimization actions, reschedule appointments or resolve overlaps.

SEE ALSO:

Salesforce Help: Schedule High-Priority Appointments (can be outdated or unavailable during release preview)

Shape Up with New Tests in Health Check

Keep your field service configuration healthy. Added tests help you detect if a service territory lacks resources with the needed skills or whether an arrival window occurs after an appointment's due date. Also, one click can tell you if street-level routing (SLR) is set up properly.

Where: This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service managed package installed.

How: In the Field Service Admin app, select **Health Check** in Field Service Settings.

SEE ALSO:

Salesforce Help: Test Your Field Service Configuration with Health Check (can be outdated or unavailable during release preview)

Offload Sandbox Services for Routing and Optimization

Configure your Salesforce sandbox orgs to use independent remote sites for street-level routing (SLR) and optimization services. To keep your production orgs running smoothly, we added dedicated remote sites for sandboxes. In a future release, we'll require sandboxes to use these sites for SLR and optimization services.

Where: This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. It applies to sandbox orgs installed with the Field Service managed package before Winter '21.

How: In Setup on the sandbox org, go to **Remote Site Settings** and activate the FSL_GIS_SB and FSL_Optimize_SB sites.

SEE ALSO:

Salesforce Help: Configure Remote Site Settings (can be outdated or unavailable during release preview)

Field Service Mobile: Time Sheets, Notification Enhancements, and Actions Launcher Parity

Workers can get more done in the Field Service mobile app. They can submit past and present time sheets, send relevant notifications, and see when new messages arrive. Actions launcher parity between Android and iOS makes it easier for teams on both platforms to use the app.

IN THIS SECTION:

Send Meaningful Messages Using Custom Notifications

Customize the messages you send to your mobile workers based on your business needs. You can extend or replace the default notifications with important information related to any part of your workflow. For example, you can let workers know when inventory is low or if there's an urgent service appointment for them to get to.

Log Work Hours with Time Sheets (Generally Available)

For mobile workers that cross time zones, you can automatically capture the time zone where the work occurs. On a mobile device, workers can submit past time sheets with corrections.

Never Miss a Message in Notifications

Mobile workers on Android can see when they get notifications so they don't miss an important event such as changes to service appointments. Workers tap an alert to view the list of messages, and they can also see opened messages offline. Previously, notification alerts were only available in iOS.

Be More Efficient with the Actions Launcher Redesign

Working on iOS and Android is easier with the updated Actions launcher. The Actions launcher's look and feel is now the same across platforms, giving users a consistent experience, no matter their device. Section headers make it faster to find what you're looking for when navigating through actions lists.

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Where: This change applies to the Field Service mobile app in Enterprise, Performance, Unlimited, and Developer editions.

How: Create custom notifications using the Notification Builder. You can then add custom notifications from a process, flow, or REST API.

SEE ALSO:

Salesforce Help: Send Custom Notifications (can be outdated or unavailable during release preview)

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SEE ALSO:

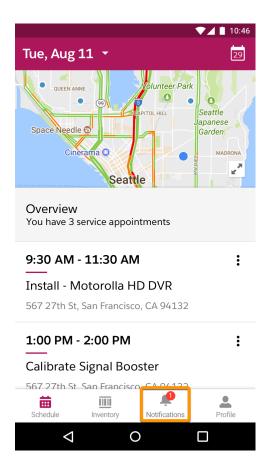
Salesforce Help: Get Started with Time Sheets (can be outdated or unavailable during release preview)

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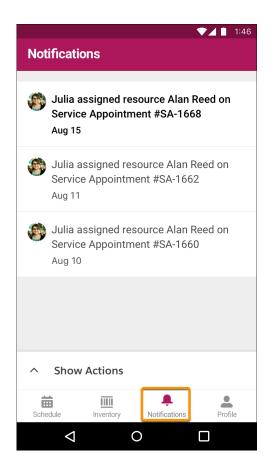
Mobile workers on Android can see when they get notifications so they don't miss an important event such as changes to service appointments. Workers tap an alert to view the list of messages, and they can also see opened messages offline. Previously, notification alerts were only available in iOS.

Where: This change applies to Field Service for Android.

How: An alert on the notification tab shows workers the number of unseen messages.



Opening the list of notifications makes the alert disappear. If an admin deletes a notification before a worker views it, they see an error message when they open the message. If they get a notification after they open the notification tab, they can swipe down on the screen to refresh the notifications list.



SEE ALSO:

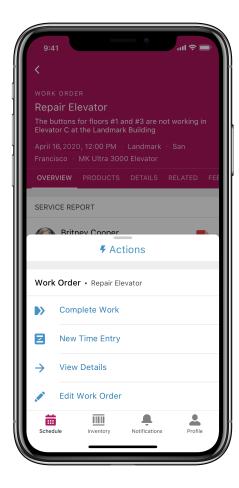
Salesforce Help: Customize Push Notifications for the Field Service Mobile App (can be outdated or unavailable during release preview)

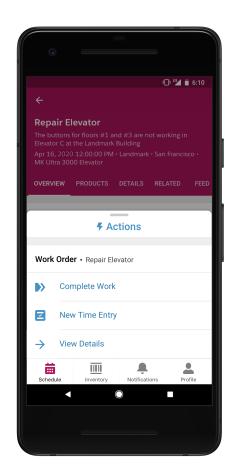
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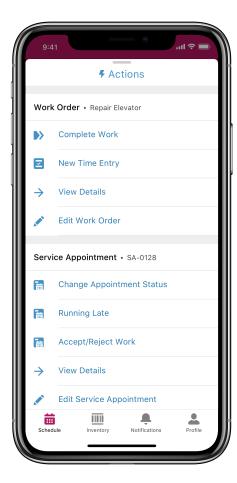
Where: This change applies to Field Service for iOS and Android.

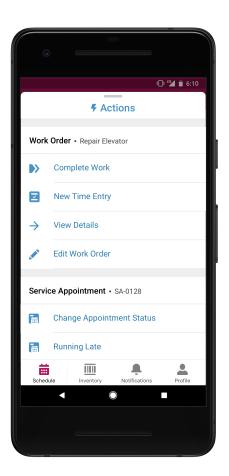
How: Tap, swipe, or slide the Actions launcher to open to a half screen.



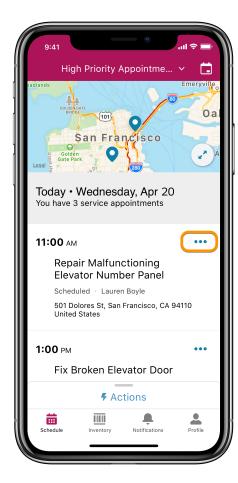


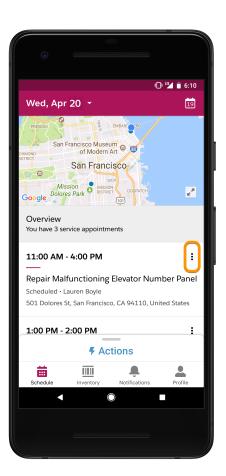
Repeat the gesture to expand to a full screen.



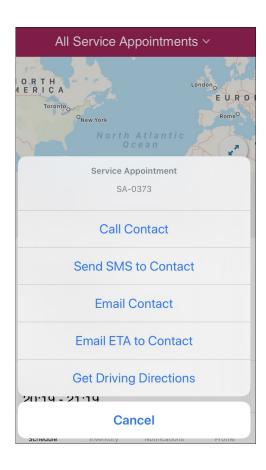


You can also tap the options menu icon to open a menu for tasks related to an action item.





Section headers organize actions by object type, for example, service appointments or work orders. More Actions lists actions not associated with an object type.



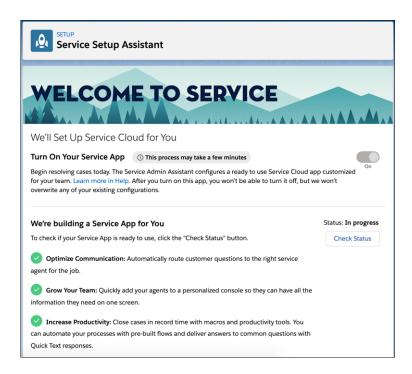
Service Setup Assistant: Go from Zero to Console in Minutes

Get started with Service Cloud faster than ever. The out-of-the-box setup assistant does the heavy lifting—link your support email and add your team members. This process sets up everything you need to start resolving cases the same day: the Lightning Service Console App, custom profiles, Email to Case, queues, and the case Lightning record page. We also add prebuilt Quick Text, macros, and Lightning Flows to streamline your workflow.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Professional, and Developer editions.

Who: Service Setup Assistant is available to Salesforce orgs with Service Cloud licenses.

How: To get started with Service, click **Service Setup Assistant** from the Setup menu.



Channels: Voice Setup with Amazon Connect for Sales, Messaging Templates, and Channel Menu Code Settings

Bring the power of integrated telephony to your sales and support organizations with faster Service Cloud Voice setup. Increase agent productivity with the Voice toolkit API, automation, collaboration tools, and usability improvements. Build Messaging templates with more flexibility using Lead and Opportunity records. Customize your Channel Menu with Code Settings and avoid tangling with HTML on your web pages.

IN THIS SECTION:

Voice: Now Available in Sales Cloud, API Toolkit, Process Automation Tools, and Collaboration and Usability Improvements

Bring the power of natively integrated Voice telephony to Sales Cloud. Build solutions for your business with the Service Cloud Voice Toolkit API and packageable custom fields. Increase your contact center's efficiency with process automation tools such as macros, quick actions, Lightning flows, processes, and workflows. Increase agent productivity with faster setup, collaboration tools like Chatter, and usability improvements to the call transfer interface, call recording component, call recording player, and voice call record page. Let your agents pause call recordings to protect customers' private information.

Messaging: Enhancements to Templates and Object Permissions

We added more flexibility when building Messaging templates and give admins more control over Messaging object permissions. Also, you can now use Omni-Channel Skills-Based Routing Rules for Messaging.

Chat: Routing Types Renamed, Skills-Based Routing Rules

Take note of some changes to the terminology in Chat Buttons & Invitations. Check out Skills-Based Routing Rules which now support chat.

Embedded Service for Web: Channel Menu Code Settings, Community Chat Invitations, and New Message Icon for Chat

Deploy Channel Menu Code Settings with JavaScript static resources in Service Setup for more flexibility. Send customers invitations to chat in communities with code settings. Use a sleek new message icon in Chat for streamlined conversations.

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IN THIS SECTION:

Amp Up Sales Cloud with Voice

Amplify your sales teams with Voice, the Salesforce intelligent native telephony solution. Salespeople can talk with your customers using an intuitive softphone that combines the power of Amazon Connect, including real-time call transcription. Bring voice calls and your digital channels together so your sales representatives can reach customers at the right time using the channel that customers prefer.

Spend Less Time Setting Up Voice with Improved Setup

Get your contact center up and running even faster thanks to the improved setup experience in Service Cloud Voice. The updated Voice Setup page guides you through the setup steps. And several steps previously required to configure your Amazon Connect instance are now automated.

Recommend the Next Best Action for Agents with the Service Cloud Voice Toolkit API (Generally Available)

Leverage your company's knowledge of the customer to suggest the best action for an agent to take so you can retain customers and increase customer satisfaction. Empower your agents with intelligent recommendations in the Einstein Next Best Action component and the Actions & Recommendation component based on information in Voice Call records and call transcripts. Use the events for call state changes, such as start call, end call, mute, and hold, to build event-driven solutions. Use the APIs in the Service Cloud Voice Toolkit to push context-sensitive recommendations based on field values in the call record and keywords in the call transcript.

Kick Off Lightning Flows, Processes, and Workflows Based on Voice Call Records

Harness the power of Salesforce automation tools to enforce your company's business processes when a Voice Call record is created or modified. For example, use a workflow to automatically send an email when a Voice Call field is updated, or automatically change a Voice Call field when a field in a related record is updated. You also can create records based on Voice Call records. For example, you can create a case or a lead when a Voice Call is created or updated. Voice Call records are supported on Lightning processes, flows, and workflows.

Work More Efficiently on Voice Call Records with Macros and Quick Actions

Agents can run macros and quick actions on Voice Call records so they can work more efficiently. For example, agents can run a macro that updates the Call Disposition field to Resolved and sends the customer a follow-up email. Bulk macros and quick actions are supported on the Voice Call object and on Voice Call records.

Let Agents Pause and Resume Call Recordings

Help your agents protect your customers' private information such as Social Security numbers by letting agents pause and resume call recording.

Listen to Call Recordings on the Improved Call Recording Player

The call recording player has an updated appearance and usability improvements, including a progress indicator, call type indicator, and timestamp.

Transfer Callers to the Right Agent with a More Intuitive User Interface

It's easier for agents to transfer calls to another agent and to add callers to a call in the updated Omni-Channel Call Controls tab. Agents can introduce the new agent to the customer by merging two calls into one call: "I'm adding Jane Doe to our call." They can switch from one call to the other, so customers don't need to repeat themselves: "Let me put you on hold for a minute while I update our billing specialist on your situation." Agents can leave the call after the customer is transferred to the second agent, so they're available to help other customers: "Now that you're talking with the right person, I'll drop off."

Dial Phone Extensions with the Built-In Keypad

Agents can use the built-in keypad in the Omni-Channel utility to dial extensions and IVR phone trees so they can call customers with less context switching.

Collaborate Better with Chatter on Voice Call Records

The Chatter component is now available by default on the Voice Call record, so it's easier for agents to collaborate with their coworkers on calls.

Get Warnings to Avoid Ending Calls Accidentally

When an agent tries to close a Voice Call page while on a call, a popup window asks the agent to confirm whether to hang up to help prevent ending calls unintentionally.

Facilitate Training with Service Cloud Voice Transcript Monitoring

Now supervisors can view voice call transcripts as they happen to facilitate training and onboarding. Supervisors can monitor up to five Service Cloud Voice transcripts and chats in Omni-Channel Supervisor. Previously, they could monitor only chats.

Track Amazon Connect Charges in Standard Reports

Monitor your org's Amazon Connect monthly billing charges in a standard Salesforce report. See an itemized list of charges for each AWS account and region associated with your Salesforce org. Filter the report using standard Salesforce reporting tools and export the report as a .csv file.

Add Voice Call Custom Fields to Packages

Partners and ISVs can build telephony solutions for their customers by adding custom fields on the Voice Call object to a package. Use custom fields to store data from an Amazon Connect contact flow or to pass data from a Voice Call record to another object. ISVs can create a package that their customers can easily install and can push updates to the package so customers have the latest and greatest.

Stay Secure with the Revised Telephony Integration REST API

When using the Create Transcript REST API, we've modified the URI and payload slightly for improved security. Specifically, we moved the participant ID from the URI to the payload. Both versions of the API work in the Winter '21 release, but you should move to the new API as soon as you can.

Amp Up Sales Cloud with Voice

Amplify your sales teams with Voice, the Salesforce intelligent native telephony solution. Salespeople can talk with your customers using an intuitive softphone that combines the power of Amazon Connect, including real-time call transcription. Bring voice calls and your digital channels together so your sales representatives can reach customers at the right time using the channel that customers prefer.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Admin permission can create and manage Voice contact centers. Users with the Contact Center Agent permission set can access the contact center and make and receive calls.

How: From Setup, in the Quick Find box, enter *Voice Setup*, and then select **Voice Setup**. Follow the instructions on the setup page to turn on Voice, create a contact center, and configure Amazon Connect. When you configure Salesforce to use Voice, add the Omni-Channel utility to the Lightning Sales Console so your salespeople can use it to answer and make calls.

SEE ALSO:

Salesforce Help: Service Cloud Voice (can be outdated or unavailable during release preview)
Salesforce Help: Set Up Service Cloud Voice (can be outdated or unavailable during release preview)

Spend Less Time Setting Up Voice with Improved Setup

Get your contact center up and running even faster thanks to the improved setup experience in Service Cloud Voice. The updated Voice Setup page guides you through the setup steps. And several steps previously required to configure your Amazon Connect instance are now automated.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

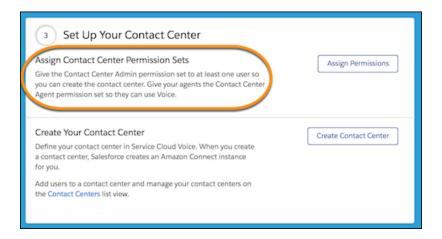
Who: Users need the Customize Application permission and the Contact Center Admin permission set to set up Service Cloud Voice. The Amazon Connect administrator can configure the Amazon Connect instance.

Why: Spend less time setting up Voice and more time helping your customers.

Updated wording and an added visual checkmark indicate when your org satisfies the Voice prerequisites for MyDomain and Omni-Channel.



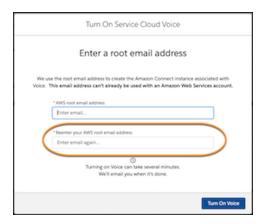
Updated wording on the Set Up Contact Center step tells you which permission sets to give your agents so they can start helping customers.



A new Finish Up step provides a link to the setup documentation so you can quickly find the right information to finish setting up Voice.



The updated Turn On Service Cloud Voice modal window asks you to enter your email address twice so you can be sure that Amazon Web Services root user email is correct.



When Salesforce creates your contact center, it automatically enables call recording, call audio streaming, data streaming for transcripts, and configures single sign-on (SSO), saving you time. Previously, those features required manual configuration.

How: From Setup, in the Quick Find box, enter *Voice Setup*, and then select **Voice Setup**. Follow the instructions on the setup page to turn on Voice, create a contact center, and configure Amazon Connect.

SEE ALSO:

Salesforce Help: Set Up Service Cloud Voice (can be outdated or unavailable during release preview)
Salesforce Help: Configure Your Amazon Connect Instance (can be outdated or unavailable during release preview)

Recommend the Next Best Action for Agents with the Service Cloud Voice Toolkit API (Generally Available)

Leverage your company's knowledge of the customer to suggest the best action for an agent to take so you can retain customers and increase customer satisfaction. Empower your agents with intelligent recommendations in the Einstein Next Best Action component and the Actions & Recommendation component based on information in Voice Call records and call transcripts. Use the events for call state changes, such as start call, end call, mute, and hold, to build event-driven solutions. Use the APIs in the Service Cloud Voice Toolkit to push context-sensitive recommendations based on field values in the call record and keywords in the call transcript.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

SEE ALSO:

Salesforce Help: Einstein Next Best Action Entitlements (can be outdated or unavailable during release preview)

Salesforce Help: Get Started with Einstein Next Best Action (can be outdated or unavailable during release preview)

Service Cloud Voice Developer Guide: Service Cloud Voice Toolkit API (can be outdated or unavailable during release preview)

Kick Off Lightning Flows, Processes, and Workflows Based on Voice Call Records

Harness the power of Salesforce automation tools to enforce your company's business processes when a Voice Call record is created or modified. For example, use a workflow to automatically send an email when a Voice Call field is updated, or automatically change a Voice Call field when a field in a related record is updated. You also can create records based on Voice Call records. For example, you can create a case or a lead when a Voice Call is created or updated. Voice Call records are supported on Lightning processes, flows, and workflows.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

How: Use Flow Builder to automatically start a flow when a Voice Call record is created or modified. Use Process Builder to launch processes when a Voice Call record is created or modified. Use Workflow rules to trigger standard internal procedures when a Voice Call record is created or modified.

SEE ALSO:

Salesforce Help: Lightning Process Builder (can be outdated or unavailable during release preview)

Salesforce Help: Flows (can be outdated or unavailable during release preview)

Salesforce Help: Workflow (can be outdated or unavailable during release preview)

Work More Efficiently on Voice Call Records with Macros and Quick Actions

Agents can run macros and quick actions on Voice Call records so they can work more efficiently. For example, agents can run a macro that updates the Call Disposition field to Resolved and sends the customer a follow-up email. Bulk macros and quick actions are supported on the Voice Call object and on Voice Call records.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: To create actions, users need the Customize Application permission. To view, create, and edit macros, users need the Read, Create, and Edit permissions on macros. To create and run irreversible macros, users need the Manage Macros that Can't Be Undone permission. To run bulk macros, users need the Run Macros on Multiple Records permission.

How: To create a macro, use the Macro Builder to build a macro and select Voice Call as the object to apply the macro to. Specify the macro's actions and then run the macro.

To create an object-specific action, go to the management settings for the Voice Call object and then go to Buttons, Links, and Actions, and create your action. Agents can run the action on Voice Call records.

SEE ALSO:

Salesforce Help: Create Macros in Lightning Experience (can be outdated or unavailable during release preview)
Salesforce Help: Create Object-Specific Quick Actions (can be outdated or unavailable during release preview)

Let Agents Pause and Resume Call Recordings

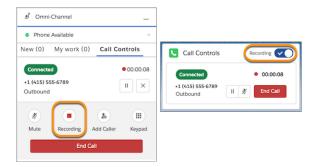
Help your agents protect your customers' private information such as Social Security numbers by letting agents pause and resume call recording.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Agent permission set can access the contact center and make and receive calls. Users with the Control Call Recording permission can pause and resume call recordings.

Why: To temporarily pause the recording, click **Recording** in the Omni-Channel utility or the Recording radio button in the Call Controls component. To resume recording, click the button again.

Previously, if call recording was enabled, the entire conversation was recorded and agents couldn't pause the recording.



How: In new contact centers, add the Call Controls component to your Lightning record page. Then give agents the Control Call Recording user permission so they can pause and resume recordings.

If you already have a Voice contact center, follow the update steps to enable call recording and pausing in your Amazon Connect instance.

SEE ALSO:

Knowledge Article: Service Cloud Voice Contact Center Updates

Salesforce Help: Configure Salesforce for Service Cloud Voice (can be outdated or unavailable during release preview)

Salesforce Help: Configure Your Amazon Connect Instance (can be outdated or unavailable during release preview)

Salesforce Help: Honor Customer Privacy When Recording Calls (can be outdated or unavailable during release preview)

Listen to Call Recordings on the Improved Call Recording Player

The call recording player has an updated appearance and usability improvements, including a progress indicator, call type indicator, and timestamp.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Agent permission set can access the contact center and make and receive calls. Users with the View Call Recording permission can listen to recorded calls.

Why: The component's title, Call Audio Player, is displayed, so screen readers can tell which component they're on. A pill box indicates whether the call was inbound, outbound, or transferred, so agents can tell what type of call it was. The date and start time of the call is displayed, so agents can easily tell when the call occurred. A progress indicator shows where the listener is on the call.



How: To let agents listen to call recordings, add the Call Recording Player component to the Voice Call record page. Agents can click the play button to hear the recording.

SEE ALSO:

Salesforce Help: Configure Salesforce for Service Cloud Voice (can be outdated or unavailable during release preview)
Salesforce Help: Standard Lightning Page Components (can be outdated or unavailable during release preview)

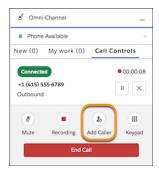
Transfer Callers to the Right Agent with a More Intuitive User Interface

It's easier for agents to transfer calls to another agent and to add callers to a call in the updated Omni-Channel Call Controls tab. Agents can introduce the new agent to the customer by merging two calls into one call: "I'm adding Jane Doe to our call." They can switch from one call to the other, so customers don't need to repeat themselves: "Let me put you on hold for a minute while I update our billing specialist on your situation." Agents can leave the call after the customer is transferred to the second agent, so they're available to help other customers: "Now that you're talking with the right person, I'll drop off."

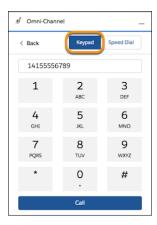
Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Agent permission set can make and receive phone calls in Service Cloud Voice.

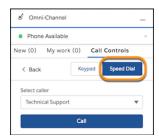
How: To add another person to a call or to transfer a call to another agent or queue, click **Add Caller** in the Omni-Channel Call Controls tab.



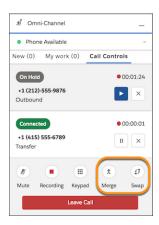
To use the keypad to dial an external caller, click **Keypad** and enter the number. Agents also can use the keypad to select from a phone tree or to dial an extension.



To use speed dial or to call Amazon Connect Quick Connect numbers, click **Speed Dial** and select the caller.



After the second caller is connected, the Swap and Merge buttons are displayed on the Omni-Channel Call Controls tab.



Previously, the buttons for Speed Dial, Transfer, Swap, and Merge calls all appeared on the main Omni-Channel Call Controls tab.

SEE ALSO:

Salesforce Help: Help Customers on the Phone (can be outdated or unavailable during release preview)

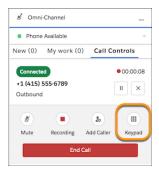
Dial Phone Extensions with the Built-In Keypad

Agents can use the built-in keypad in the Omni-Channel utility to dial extensions and IVR phone trees so they can call customers with less context switching.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Agent permission set can make and receive phone calls in Service Cloud Voice.

How: When an agent is on a call, click **Keypad** in the Omni-Channel utility to dial phone numbers, extensions, and phone trees.



SEE ALSO:

Salesforce Help: Help Customers on the Phone (can be outdated or unavailable during release preview)

Collaborate Better with Chatter on Voice Call Records

The Chatter component is now available by default on the Voice Call record, so it's easier for agents to collaborate with their coworkers on calls.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

How: Open a Voice Call record to view the Chatter feed, post, @mention colleagues, create tasks from feed items, link to records, and more.

SEE ALSO:

Salesforce Help: Help Customers on the Phone (can be outdated or unavailable during release preview)

Salesforce Help: Work with Feeds (can be outdated or unavailable during release preview)

Salesforce Help: Work with Posts (can be outdated or unavailable during release preview)

Get Warnings to Avoid Ending Calls Accidentally

When an agent tries to close a Voice Call page while on a call, a popup window asks the agent to confirm whether to hang up to help prevent ending calls unintentionally.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Contact Center Agent permission set can access the contact center and make and receive calls. Users with the View Call Recording permission can listen to recorded calls.

Why: The confirmation window is shown only for Voice Call records that have the Call Controls Component added to the page layout. Previously, agents could not close a Voice Call record during an active call.



SEE ALSO:

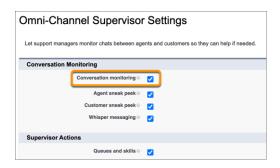
Salesforce Help: Help Customers on the Phone (can be outdated or unavailable during release preview)

Facilitate Training with Service Cloud Voice Transcript Monitoring

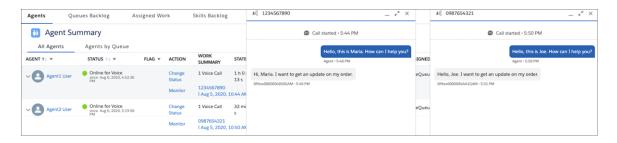
Now supervisors can view voice call transcripts as they happen to facilitate training and onboarding. Supervisors can monitor up to five Service Cloud Voice transcripts and chats in Omni-Channel Supervisor. Previously, they could monitor only chats.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

How: Turn on **Conversation Monitoring** in Omni-Channel Supervisor Settings.



View transcripts in Omni-Channel Supervisor.



SEE ALSO:

Salesforce Help: Monitor and Support Agents in Omni-Channel Supervisor (can be outdated or unavailable during release preview)

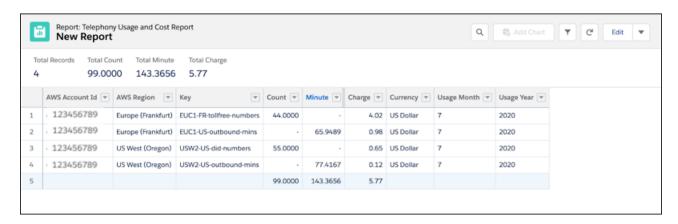
Track Amazon Connect Charges in Standard Reports

Monitor your org's Amazon Connect monthly billing charges in a standard Salesforce report. See an itemized list of charges for each AWS account and region associated with your Salesforce org. Filter the report using standard Salesforce reporting tools and export the report as a .csv file.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Create and Customize Reports permission can create, edit, and delete reports in private folders. Users with the Report Builder permission can create, edit, and delete reports in both public and private folders.

Why: The Telephony Usage and Cost Report shows your org's usage for each AWS account, AWS region, month, year, number of minutes, number of utterances, and the associated charges. Aggregated billing data for the previous month is available on the fifth of the following month. For example, billing data for June is available on July 5.



How: Create a custom report type where Voice Usage and Cost Metrics are the primary object, and deploy the report type. Then create a report, add the columns in the order that you prefer, and filter the report by month and year, and run your report.

SEE ALSO:

Salesforce Help: Create a Report to Track Your Amazon Connect Usage (can be outdated or unavailable during release preview)

Add Voice Call Custom Fields to Packages

Partners and ISVs can build telephony solutions for their customers by adding custom fields on the Voice Call object to a package. Use custom fields to store data from an Amazon Connect contact flow or to pass data from a Voice Call record to another object. ISVs can create a package that their customers can easily install and can push updates to the package so customers have the latest and greatest.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Users with the Create AppExchange Packages permission can create packages and add components to them.

How: Create custom fields on the Voice Call object. Then create a package and add the Voice Call custom fields as a component of the package.

SEE ALSO:

Salesforce Help: Create Custom Fields (can be outdated or unavailable during release preview)

Salesforce Help: Work with Packages (can be outdated or unavailable during release preview)

Salesforce Help: Add Components to Your Package (can be outdated or unavailable during release preview)

Stay Secure with the Revised Telephony Integration REST API

When using the Create Transcript REST API, we've modified the URI and payload slightly for improved security. Specifically, we moved the participant ID from the URI to the payload. Both versions of the API work in the Winter '21 release, but you should move to the new API as soon as you can.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an extra cost as an add-on license in Sales Cloud and Service Cloud.

Who: Any users accessing the Service Cloud Voice Telephony Integration REST API must update to this new API.

When: This change is available in API version 50.0. The old API is available until February 15, 2021.

How: Update your URI to comply with the updated syntax that no longer contains the participant ID.

- Old URI: /telephony/v1/voiceCalls/{voiceCallId}/participants/{participantId}/messages
- New URI: /telephony/v1/voiceCalls/{voiceCallId}/messages

Then update your payload to comply with the updated syntax that now contains a participant ID.

Old payload example:

```
"messageId": "57904eb6-5352-4c5e-adf6-5f100572cf5d116",
"startTime": 1573503300,
"endTime": 1573503320,
"content": "Hello All",
"senderType": "VIRTUAL_AGENT"
}
```

New payload example:

```
{
  "participantId": "5324881f-1e84-4367-8930-f69a74b30ca6",
  "messageId": "57904eb6-5352-4c5e-adf6-5f100572cf5d116",
  "startTime": 1573503300,
  "endTime": 1573503320,
  "content": "Hello All",
  "senderType": "VIRTUAL_AGENT"
}
```

SEE ALSO:

Service Cloud Voice Implementation Guide: Create Transcript REST API (can be outdated or unavailable during release preview)

Messaging: Enhancements to Templates and Object Permissions

We added more flexibility when building Messaging templates and give admins more control over Messaging object permissions. Also, you can now use Omni-Channel Skills-Based Routing Rules for Messaging.

IN THIS SECTION:

Create Messaging Templates Using Leads and Opportunities

Build automated templates to keep customers and potential customers up to speed when specific conditions are met. Messaging templates now let you use fields from Lead and Opportunity records. Previously, this feature only supported the following Salesforce objects: Account, Asset, Case, Contact, Location, Organization, User.

Specify Permissions for Messaging Session Objects

Bring more flexibility and control to your permission policy. Admins can now set the permissions for Messaging users and Messaging sessions.

Omni-Channel Routing Types Renamed

We renamed the Omni-Channel Queue routing type Omni-Channel. And we renamed the Omni-Channel Skills routing type Channel Skills.

Use Skills-Based Routing Rules to Direct Messages to the Right Agents

Skills-based routing rules can help you route a Messaging session to the right agent with the right skills. Check out the new Skills-Based Routing Rules for Omni-Channel routable channels.

Send One-to-Many Messages with Broadcast Messaging

Send one-to-many messages via SMS to contacts, person accounts, and messaging users. We've also added Messaging support for the Employee object, so you can send one-to-one and one-to-many messages to your employees with Work.com.

Create Messaging Templates Using Leads and Opportunities

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Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Create Messaging Templates for Automatic Message Notifications (can be outdated or unavailable during release preview)

Specify Permissions for Messaging Session Objects

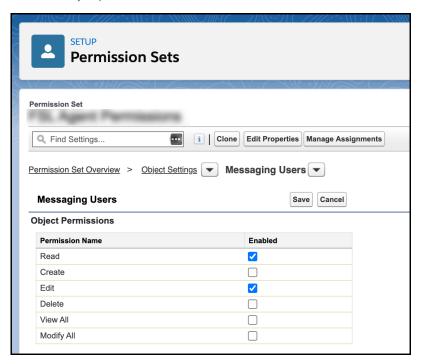
Bring more flexibility and control to your permission policy. Admins can now set the permissions for Messaging users and Messaging sessions.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To check Messaging permissions, follow these instructions.

- 1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 2. Select the permission set for your agents.

- **3.** From the permission set options, click **Object Settings**.
- **4.** Scroll down to "Messaging Users" and "Messaging Sessions". Click each option.
- **5.** Review the object permissions.



6. If you make changes, click **Save**.

SEE ALSO:

Salesforce Security Guide: Control Who Sees What (can be outdated or unavailable during release preview)
Salesforce Security Guide: Object Permissions (can be outdated or unavailable during release preview)

Omni-Channel Routing Types Renamed

We renamed the Omni-Channel Queue routing type Omni-Channel. And we renamed the Omni-Channel Skills routing type Channel Skills.



Note: Interested in a more powerful method of routing work to agents based on skills? Check out Skills-Based Routing Rules.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Routing Types for Chat and Messaging Were Renamed

Salesforce Help: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Use Skills-Based Routing Rules to Direct Messages to the Right Agents

Skills-based routing rules can help you route a Messaging session to the right agent with the right skills. Check out the new Skills-Based Routing Rules for Omni-Channel routable channels.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Use Omni-Channel Skills-Based Routing Rules to Route Chats and Messages to Agents with the Right Skills *Salesforce Help*: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Send One-to-Many Messages with Broadcast Messaging

Send one-to-many messages via SMS to contacts, person accounts, and messaging users. We've also added Messaging support for the Employee object, so you can send one-to-one and one-to-many messages to your employees with Work.com.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: Set up Messaging and create at least one SMS Messaging channel. Then, assign the *Send One-to-Many Messages* permission to users.

SEE ALSO:

Work.com Release Notes: (can be outdated or unavailable during release preview)

Salesforce Help: Broadcast Messaging (can be outdated or unavailable during release preview)

Chat: Routing Types Renamed, Skills-Based Routing Rules

Take note of some changes to the terminology in Chat Buttons & Invitations. Check out Skills-Based Routing Rules which now support chat.

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SEE ALSO:

Use Omni-Channel Skills-Based Routing Rules to Route Chats and Messages to Agents with the Right Skills Salesforce Help: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Embedded Service for Web: Channel Menu Code Settings, Community Chat Invitations, and New Message Icon for Chat

Deploy Channel Menu Code Settings with JavaScript static resources in Service Setup for more flexibility. Send customers invitations to chat in communities with code settings. Use a sleek new message icon in Chat for streamlined conversations.

IN THIS SECTION:

Reimagine Customer Interactions with Channel Menu Code Settings

Avoid tangling with HTML code on every web page, and create unique page-level settings with your static resources in Salesforce Setup. You're free to imagine and change how you connect with customers using the Channel Menu on your website or in a Salesforce community.

Customize Communities with Code Settings for Embedded Chat and Channel Menu

Invite customers to chat in your Salesforce community for a more personalized experience. A Code Setting Name property added in Experience Builder allows you to load custom JavaScript that appears as pop-up invitations for visitors as they browse.

Track Chat Conversations with a New Message Icon

Provide a modern experience for your Embedded Chat users with a sleek new message notification and arrow. The icon, showing the number of unread messages, appears in the chat window above those messages. The user can scroll down to read and know when an agent is typing.

Streamline Bot Responses for Screen Readers

Deliver a condensed summary of options in the chat window for screen reader users who interact with Einstein Bots. This update makes screen readers automatically responsive and provides a more accessible experience.

Reimagine Customer Interactions with Channel Menu Code Settings

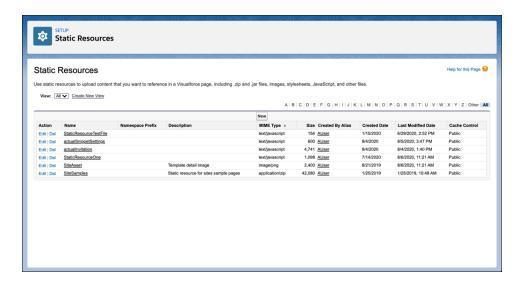
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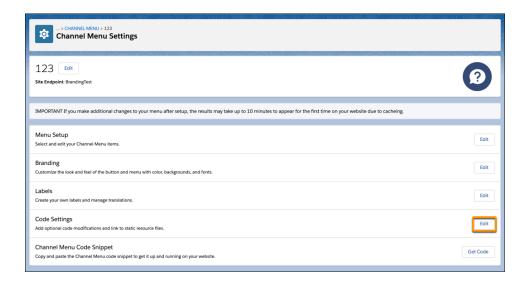
Where: This change applies to Digital Engagement for Lightning Experience in Professional, Performance, Unlimited, and Essential editions.

Why: Adding JavaScript code as a static resource to your Salesforce org provides the flexibility of changing your customer touchpoints such as adding extra pre-chat or other settings. With a few clicks, this process avoids messy web page code customizations.

How: To add your JavaScript file, search Static Resources in the Quick-Find box in Setup. On the Channel Menu Settings page, edit your Code Settings to apply deployment-level modification. Create one or many setting files with your static resources to load with each

page. This optional customization requires adding the code setting name to your Channel Menu Code Snippet. Admins must access and enable the Author Apex user permission to use Code Settings.





SEE ALSO:

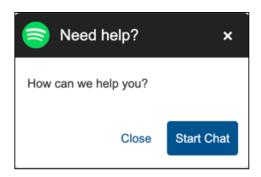
Salesforce Help: Add Channel Menu Code Settings (can be outdated or unavailable during release preview)
Salesforce Help: Create Embedded Static Resources (can be outdated or unavailable during release preview)

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Where: This change applies to Digital Engagement for Lightning Experience in Professional, Performance, Unlimited, and Essential editions.

How: Admins upload static resource files to their Salesforce org and associate them with a custom object in Channel Menu Setup or Embedded Chat Setup under Code Settings. In the property builder, load the Code Setting Name for your community on a specific page. The file adds customizations, including chat invitations for visitors, and triggers when the page loads on their device.



SEE ALSO:

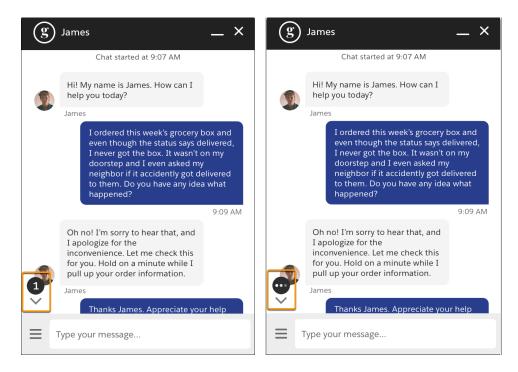
Salesforce Help: Add Chat Code Settings to a Community (can be outdated or unavailable during release preview)
Salesforce Help: Create Embedded Static Resources (can be outdated or unavailable during release preview)

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Provide a modern experience for your Embedded Chat users with a sleek new message notification and arrow. The icon, showing the number of unread messages, appears in the chat window above those messages. The user can scroll down to read and know when an agent is typing.

Where: This change applies to Digital Engagement for Lightning Experience in Professional, Performance, Unlimited, and Essential editions.

How: The icon replaces the new messages pill button in the chat window. The agent typing indicator was added to the icon and appears as an animation. The updates are automatic in Embedded Chat. No additional setup is required.

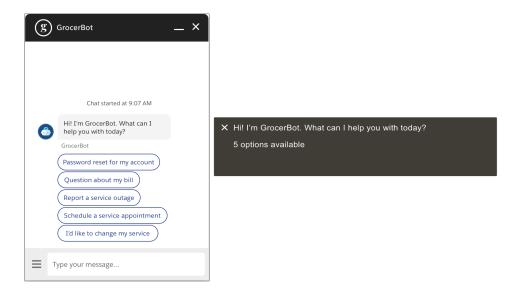


Streamline Bot Responses for Screen Readers

Deliver a condensed summary of options in the chat window for screen reader users who interact with Einstein Bots. This update makes screen readers automatically responsive and provides a more accessible experience.

Where: This change applies to Digital Engagement for Lightning Experience in Professional, Performance, Unlimited, and Essential editions.

How: Instead of repeating every choice in the Embedded Chat window for screen readers, a Bot agent responds with a summary of options. The update summarizes the number of options available and prompts the user to decide if they want to hear them.



SEE ALSO:

Add More Accessibility for Chat Accessibility Standards

Knowledge: Enhancements to Sharing, Article Linking

Use standard sharing for Knowledge with Guest Users and High-Volume Community Users, change ownership of multiple articles at once, and track article ownership. Use Linked Articles with Voice and Related Lists with Voice, Chat, Messaging, and Social Post.

IN THIS SECTION:

Enhancements to Sharing for Lightning Knowledge (Generally Available)

Standard Salesforce sharing for Lightning Knowledge, now generally available, includes some changes since the last release.

Knowledge Enhancements for Channels

The Summer '20 release added Linked Articles to Chat, Messaging, and Social conversation. The Winter '21 release extends that functionality to Voice and adds the ability to use Related Lists for all four channels. Additionally, you can now manually attach and detach articles from channels.

Changed Permissions for Linked Articles

Access to linked articles in the API is limited to users with access to the Knowledge article.

Enhancements to Sharing for Lightning Knowledge (Generally Available)

Standard Salesforce sharing for Lightning Knowledge, now generally available, includes some changes since the last release.

IN THIS SECTION:

Use Knowledge Sharing with Guest Users and High-Volume Community Users

We enhanced standard sharing for Knowledge to make sharing work the way it does for other Salesforce objects. Use criteria-based record-sharing rules to control which articles are exposed to your community's guest users. Use sharing groups and sharing sets to share articles owned by High-Volume Community Users and portal users. Lightning Knowledge only.

Transfer Ownership of Published and Archived Articles

The Spring '20 release introduced the ability to change a draft article's owner in Salesforce Lightning. You can change the ownership of published and archived versions at the same time you change a draft version's owner.

Perform Mass Ownership Changes on Draft Articles

Now you can change the ownership of multiple draft articles simultaneously, including translations.

Track Article Ownership Changes

Now that Knowledge for Lightning Experience includes the ability to change article ownership, you can track that ownership. We added an Owner field to the Knowledge Field History for all article versions.

Use Knowledge Sharing with Guest Users and High-Volume Community Users

We enhanced standard sharing for Knowledge to make sharing work the way it does for other Salesforce objects. Use criteria-based record-sharing rules to control which articles are exposed to your community's guest users. Use sharing groups and sharing sets to share articles owned by High-Volume Community Users and portal users. Lightning Knowledge only.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

Why: Sharing for High-Volume Community Users is new for Knowledge for Summer '20.

Although Guest User sharing was available with Knowledge in the Summer '20 release, sharing in Knowledge followed external sharing rules. Now, normal Guest User security policies apply to Knowledge.

How: In Knowledge Settings, enable Lightning Knowledge and standard Salesforce sharing. For Guest User sharing, go to Setup->Sharing Settings, and set Secure guest user record access.

For sharing with High-Volume Community Users, use sharing groups and sharing sets.

SEE ALSO:

Salesforce Help: Sharing for Lightning Knowledge (can be outdated or unavailable during release preview)

Salesforce Help: Sharing Considerations for Lightning Knowledge (can be outdated or unavailable during release preview)

Salesforce Help: Use Share Groups to Share Records Owned by High-Volume Community Users (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Sharing Sets (can be outdated or unavailable during release preview)

Salesforce Help: Guest User Security Policies and Timelines (can be outdated or unavailable during release preview)

IdeaExchange: Allow Sharing Rule assignments to Knowledge Articles

IdeaExchange: Sharing Settings for Knowledge__kav object

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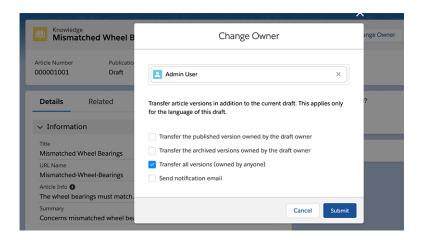
Who: To change the ownership of an article, you must:

- Be a Knowledge user.
- Have the Manage Article user permission.
- Have Read and Edit permissions for the article.

Why: With this enhancement, you can change the ownership of any version of any article. For example, this is useful if the owner of a published article no longer works at your company.

How: With a draft article that also has archived or published versions, the Change Owner button on the record's home enables you to change the other versions.

- To transfer the article owner's published version for the language of the current draft, select **Transfer the published version owned by the draft owner**.
- To transfer the article owner's archived versions for the language of the current draft, select **Transfer the archived versions owned by the draft owner**.
- To transfer all published and archived versions owned by anyone for the language of the current draft, select **Transfer all versions** (owned by anyone).



SEE ALSO:

Salesforce Help: Considerations for Changing a Record's Owner (can be outdated or unavailable during release preview)
Salesforce Help: Lightning Knowledge User Access (can be outdated or unavailable during release preview)

Perform Mass Ownership Changes on Draft Articles

Now you can change the ownership of multiple draft articles simultaneously, including translations.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

Who: To use the Mass Change Owner action, users must have permission to transfer records, manage articles, and have Knowledge object permission to create, read, and edit articles. To be an article owner, the user or queue must have permission to view draft articles. When you use data categories to control record access, the owner needs category-based access.

Why: The Summer '20 release introduced the ability to change the owner of a draft article in Lightning Knowledge. However, it allowed you to work on only one article at a time.

How: In a list view of Knowledge articles, select the articles you want to change, and select Change Owner.

Note that:

- You must have Change Owner on the Knowledge page layout.
- If you select published and archived articles along with draft articles, the draft articles are changed. The published and archived articles are not. But they can still be changed individually.

SEE ALSO:

Salesforce Help: When Are Lightning Authoring Actions Available? (can be outdated or unavailable during release preview)

Track Article Ownership Changes

Now that Knowledge for Lightning Experience includes the ability to change article ownership, you can track that ownership. We added an Owner field to the Knowledge Field History for all article versions.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

Who: Article history respects field, entity, and record-level security. You must have at least Read permission on the article type or the field to access its history.

How: To track ownership changes of Knowledge articles, make sure that:

- Lightning Knowledge is enabled.
- Field Tracking is enabled for the Knowledge Base.
- The Owner field is turned on for the field tracking.

Changes of ownership are displayed for all article versions that are updated, including online and archived articles and draft articles. A SOQL query on **KnowledgeArticleVersionHistory** returns two rows for each owner change update:

- User label (old and new) stored in the oldval first name and oldval last name fields
- User Id (old and new) stored in the oldval string and newval string fields.

SEE ALSO:

Salesforce Help: Field History Tracking (can be outdated or unavailable during release preview)

Salesforce Help: Article History Tracking (Lightning Experience) (can be outdated or unavailable during release preview)

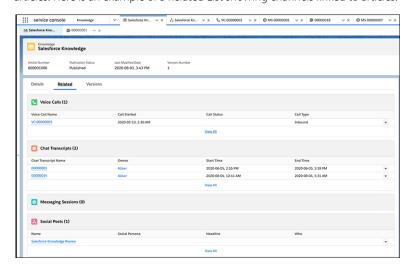
Knowledge Enhancements for Channels

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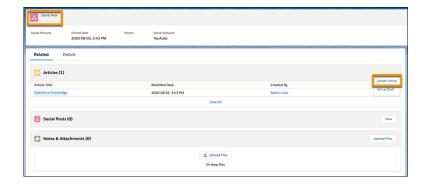
Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

Who: In addition to having Lightning Knowledge enabled, you must have Service Cloud and the channels you want to use set up. Also, you must also set up page layouts that show articles and related lists in your channels.

Why: In a channel, you can see articles in the channel's Related lists. Conversely, from Knowledge, you can see channels that link to articles. Here is an example of a Related List showing channels linked to articles.



You can now manually attach and detach articles:



SEE ALSO:

Salesforce Help: Share Articles in Channels in Lightning Knowledge (can be outdated or unavailable during release preview)
Salesforce Help: Service Cloud Channels (can be outdated or unavailable during release preview)

Changed Permissions for Linked Articles

Access to linked articles in the API is limited to users with access to the Knowledge article.

Where: This change applies to Essentials, Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience with Lightning Knowledge enabled.

Routing: Supervisor Monitoring for Voice, Supervisor Configuration (Generally Available), Name Changes, Skills-Based Routing for Chat and Messaging

Enable service supervisors to assist agents in real time with the latest Omni-Channel Supervisor enhancements. Supervisors can view voice transcripts as the phone call is in progress so they can jump in and help agents when needed. Control which agents supervisors see with Supervisor Configurations. Attribute Setup for Skills-Based Routing is renamed and is now available for Chat and Messaging.

IN THIS SECTION:

Attribute Setup for Skills-Based Routing Was Renamed

We renamed Attribute Setup for Skills-Based Routing to Skills-Based Routing Rules. It's the same great feature with a more intuitive name. Skills-Based Routing Rules let you set up skills-based routing with clicks, not code.

Use Omni-Channel Skills-Based Routing Rules to Route Chats and Messages to Agents with the Right Skills

Now you can use information from a chat or message to determine what skills are required to route the conversation to the best agent.

Routing Types for Chat and Messaging Were Renamed

The Omni-Channel Queue routing type was renamed Omni-Channel. The Omni-Channel Skills routing type was renamed Channel Skills for Messaging Channels and Button Skills for Chat buttons.

Transfer Chats to Other Agents, Queues, and Skills

An agent who receives a chat that was routed with skills-based routing rules can transfer it to another agent, queue, or skill. Previously, agents could transfer chats that were queue-routed but not skill-routed.

Show Supervisors Only the Agents on Their Teams (Generally Available)

Create supervisor configurations to determine which agents a supervisor or group of supervisors can see when they're using Omni-Channel Supervisor.

Monitor Service Cloud Voice Transcripts in Omni-Channel Supervisor

Now supervisors can view voice call transcripts as they happen to facilitate training and onboarding. Supervisors can monitor up to five Service Cloud Voice transcripts and chats in Omni-Channel Supervisor. Previously, they could monitor only chats.

Attribute Setup for Skills-Based Routing Was Renamed

We renamed Attribute Setup for Skills-Based Routing to Skills-Based Routing Rules. It's the same great feature with a more intuitive name. Skills-Based Routing Rules let you set up skills-based routing with clicks, not code.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Use Omni-Channel Skills-Based Routing Rules to Route Chats and Messages to Agents with the Right Skills

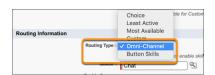
Now you can use information from a chat or message to determine what skills are required to route the conversation to the best agent.



Note: Previously, this feature was called attribute setup for skills-based routing.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In the Routing section of the Chat button or Messaging channel, set Routing Type to Omni-Channel.



On the routing configuration that's associated with the queue, select **Use with Skills-Based Routing Rules**. Optionally, add skills to the routing configuration.

When a customer starts a chat or messaging session, the session is associated with a combination of skills from skills-based routing rules and the routing configuration. These skills route chats and messaging sessions to the right agent.

At least one agent with the combination of skills from the routing configuration and skills from skills-based routing rules must be online for a chat to be queued. Otherwise, the chat session is canceled even if the button is configured with Enable Queue.



Note: The Omni-Channel Skills routing type option was renamed Button Skills for Chat buttons and Channel Skills for Messaging Channels.

SEE ALSO:

Salesforce Help: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Routing Types for Chat and Messaging Were Renamed

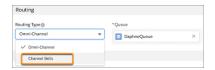
The Omni-Channel Queue routing type was renamed Omni-Channel. The Omni-Channel Skills routing type was renamed Channel Skills for Messaging Channels and Button Skills for Chat buttons.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

The Omni-Channel Skills routing type in Chat Buttons & Invitations was renamed Button Skills.



The Omni-Channel Skills routing type in Messaging Settings was renamed Channel Skills.





Note: To configure dynamic skill requirements, select the Omni-Channel routing type and configure skills-based routing rules.

SEE ALSO:

Salesforce Help: Set Up Skills-Based Routing (can be outdated or unavailable during release preview)

Transfer Chats to Other Agents, Queues, and Skills

An agent who receives a chat that was routed with skills-based routing rules can transfer it to another agent, queue, or skill. Previously, agents could transfer chats that were queue-routed but not skill-routed.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Select the Omni-Channel routing type and configure skills-based routing rules.

Show Supervisors Only the Agents on Their Teams (Generally Available)

Create supervisor configurations to determine which agents a supervisor or group of supervisors can see when they're using Omni-Channel Supervisor.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, supervisors filtered agents manually, which was time consuming. And admins were unable to limit supervisors from seeing agents outside of their team.

How: Use Supervisor Configurations in Setup.

SEE ALSO:

Salesforce Help: Limit the Agents a Supervisor or Group of Supervisors Can See (can be outdated or unavailable during release preview)

Monitor Service Cloud Voice Transcripts in Omni-Channel Supervisor

Now supervisors can view voice call transcripts as they happen to facilitate training and onboarding. Supervisors can monitor up to five Service Cloud Voice transcripts and chats in Omni-Channel Supervisor. Previously, they could monitor only chats.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Facilitate Training with Service Cloud Voice Transcript Monitoring

Case Management: Productivity Tools and Email-to-Case Threading

New prebuilt macros, quick text, and flows help enhance agent productivity and get them doing better work, faster than ever before. Email-to-Case threading behavior update boosts security by matching incoming emails with their header information instead of through a Ref ID.

IN THIS SECTION:

Enhance Security with a New Threading Behavior for Email-To-Case

A new Email-to-Case threading behavior matches incoming emails with their header information instead of through a Ref ID from the subject or body. New outbound emails don't contain a Ref ID.

Improve Agent Interactions with Prebuilt Flows

Three flows now come out-of-the-box with your Salesforce subscription to help expedite repetitive processes in your agents' daily efforts.

Boost Agent Productivity with Prebuilt Macros

New prebuilt Macros let agents control cases and send mass emails to customers with a streamlined interaction that's included with your Salesforce subscription.

Streamline Customer Interactions with Prebuilt QuickTexts

New prebuilt Quick Texts enhance agents' workflow with instant productivity. Agents can resolve cases, request more information from customers, and follow up via email after closed cases or to troubleshoot with only a few clicks.

Service Setup Assistant: Go from Zero to Console in Minutes

Get started with Service Cloud faster than ever. The out-of-the-box setup assistant does the heavy lifting—link your support email and add your team members. This process sets up everything you need to start resolving cases the same day: the Lightning Service Console App, custom profiles, Email to Case, queues, and the case Lightning record page. We also add prebuilt Quick Text, macros, and Lightning Flows to streamline your workflow.

Enhance Security with a New Threading Behavior for Email-To-Case

A new Email-to-Case threading behavior matches incoming emails with their header information instead of through a Ref ID from the subject or body. New outbound emails don't contain a Ref ID.

Where: This change applies to Lightning Experience in Professional, Enterprise, Essentials, Unlimited, Performance, and Developer Editions.

How: New orgs default to this new threading behavior. Admins for existing orgs can turn the new behavior on or off with a Release Update, until Salesforce enforces the update in the Winter '22 release. Existing orgs continue to work based on ref ID until the new behavior is enabled, to give admins time to try out the new functionality before the enforcement date.

SEE ALSO:

Salesforce Help: Case Management

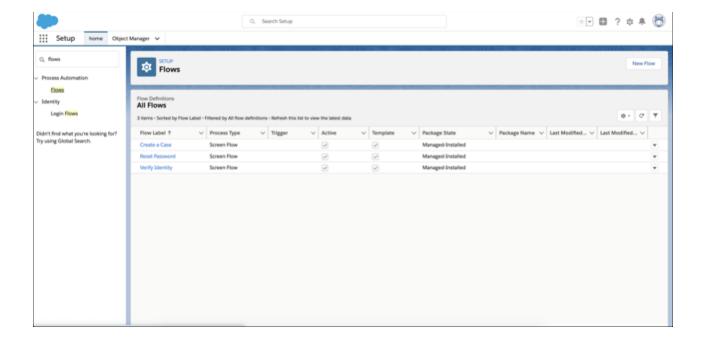
Knowledge Article: Disabled Ref Id and New Threading Behavior for Email-To-Case

Improve Agent Interactions with Prebuilt Flows

Three flows now come out-of-the-box with your Salesforce subscription to help expedite repetitive processes in your agents' daily efforts.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

How: Create a Case walks agents through the typical case creation process to eliminate user errors and streamline agent workflows. Reset Password guides agents through the customer password reset experience in a series of clicks, letting agents prioritize other important tasks. And the Verify Identity flow empowers agents to resolve cases of missing credentials in a matter of seconds.

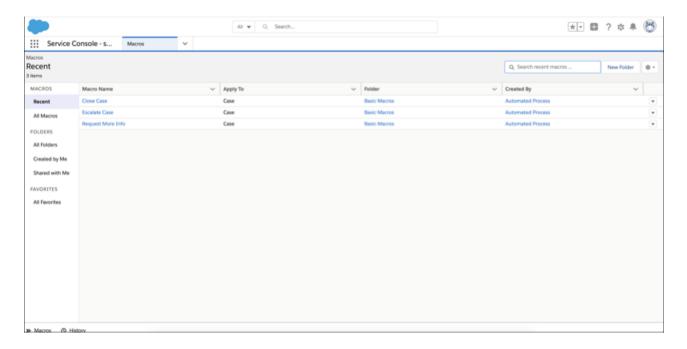


Boost Agent Productivity with Prebuilt Macros

New prebuilt Macros let agents control cases and send mass emails to customers with a streamlined interaction that's included with your Salesforce subscription.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

How: Go to Support Settings in Setup, and turn on Show Closed Statuses in Case Status Field.



SEE ALSO:

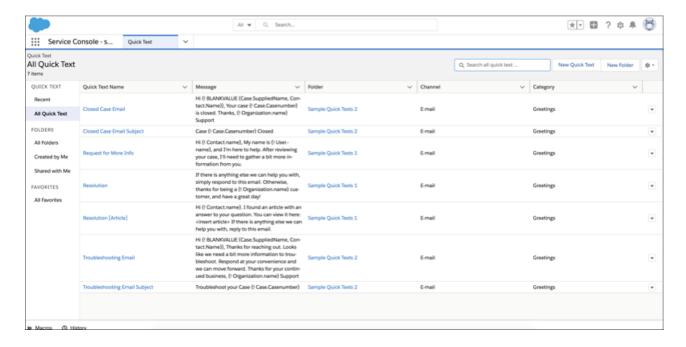
Salesforce Help: Case Management (can be outdated or unavailable during release preview)

Streamline Customer Interactions with Prebuilt QuickTexts

New prebuilt Quick Texts enhance agents' workflow with instant productivity. Agents can resolve cases, request more information from customers, and follow up via email after closed cases or to troubleshoot with only a few clicks.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

How: Share the folder **Sample Quick Texts 1**, and give read access to the service agents you want to access QuickTexts.



SEE ALSO:

Salesforce Help: Case Management (can be outdated or unavailable during release preview)
Salesforce Help: Case Management (can be outdated or unavailable during release preview)

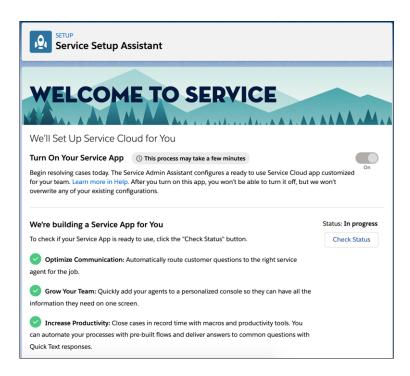
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Professional, and Developer editions.

Who: Service Setup Assistant is available to Salesforce orgs with Service Cloud licenses.

How: To get started with Service, click **Service Setup Assistant** from the Setup menu.



Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

IN THIS SECTION:

Microsoft Teams Integration: Bring Salesforce and Microsoft Teams Together for Service Reps (Pilot)

Your service teams use Salesforce to management customer relationships. They also chat in Microsoft® Teams and discuss topics relevant to their service cases. The Teams Integration provides context about Salesforce records from Teams channels and one-on-one chat conversations, eliminating switching between applications.

Service Console: Avoid Duplicating Existing Records

Help service agents using the C360 Global Profile component avoid creating duplicate contact, account, or lead records from Service Console. A green dot next to a search result alerts an agent that the result might be part of an existing Customer 360 Data Manager global profile. Agents can then search on different parts of the search result, like email address or phone number, to try to find the existing record.

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Your service teams use Salesforce to management customer relationships. They also chat in Microsoft® Teams and discuss topics relevant to their service cases. The Teams Integration provides context about Salesforce records from Teams channels and one-on-one chat conversations, eliminating switching between applications.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



Note: We provide the Teams Integration to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't quarantee acceptance. Feature isn't generally available unless or until Salesforce announces its general availability in

documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for the Teams Integration in the Outlook/Teams, Gmail, and Inbox group in the Trailblazer Community.

SEE ALSO:

Microsoft Teams Integration: Bring Salesforce and Microsoft Teams Together (Pilot)

Service Console: Avoid Duplicating Existing Records

Help service agents using the C360 Global Profile component avoid creating duplicate contact, account, or lead records from Service Console. A green dot next to a search result alerts an agent that the result might be part of an existing Customer 360 Data Manager global profile. Agents can then search on different parts of the search result, like email address or phone number, to try to find the existing record.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

Who: Users with a Customer 360 Data Manager add-on subscription.

Sales: Sales Cadence Improvements for High Velocity Sales, Global Models for Einstein Lead Scoring, Opportunity Deal Change Highlights, and Multi-Cloud Support for Billing

Organize and share sales cadences in folders, pause sales cadences, and change step ownership. Use Einstein Lead Scoring even when you don't have enough data of your own. Use opportunity deal change highlights to see what's changed in the pipeline. Create invoices and bills for orders that originate from B2B Commerce, Service Cloud, and other systems. Plus, Call Coaching users can share voice calls. Get more out of Einstein Activity Capture with new connection and configuration options. And sales reps get even more productive with emails and templates.

IN THIS SECTION:

High Velocity Sales: Einstein Call Coaching Enhancements, Sales Cadence Folders and Sharing, and Improved Sales Cadence Target Management

Call Coaching users can now see new insights and share voice calls. Organize and share sales cadences with folders, reassign targets to a different rep, pause targets in sales cadences, and use improved filters in the Work Queue.

Salesforce Maps: Uber Integration, Territory Planning Alignment Comparisons, and Advanced Route Assignments for Account Teams Ride with Uber when visiting nearby customers, get side-by-side comparisons for territory alignments and focuses, and plot shape layers using alignments of any size from Territory Planning. Assign routes to members of account teams in Salesforce Maps Advanced, and create data layers using data from sources outside Salesforce.

Sales Cloud Einstein: More Control of the Opportunity Scoring Model, Global Models for Lead Scoring, and Big Improvements to Einstein Activity Capture

When setting up Einstein Opportunity Scoring, choose to have Einstein look only at certain opportunity records and custom fields. Use Einstein Lead Scoring even when you don't have enough data of your own. And get more out of Einstein Activity Capture with new connection and configuration options.

Core Sales Features: Opportunity Deal Change Highlights and Mobile Forecasting

Quickly find the opportunities that changed in the last week. More mobile users get Collaborative Forecasts, now available for Android and iOS. Manually assign a territory to a new opportunity in fewer steps. And running custom application logic on orders is easier.

Productivity Features: Einstein Activity Capture Enhancements, Schedule Meetings More Easily, and New Email Template Builder

Einstein Activity Capture has several enhancements, such as new sync options and the new Request email insight. Sales reps can include suggested meeting times in their emails by choosing available times from their calendar. Recipients choose from among the suggested times, making it easier to set up meetings. And reps have a new option for easily and quickly creating engaging email templates with Email Template Builder. Visual tools make it efficient to add components like HTML and images.

Integration with Google: Manual Email Logging with Einstein Activity Capture Enabled, Insert Availability Improvements, Changes to Lightning Sync Availability

Reps can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. We made improvements to the Insert Availability window in the Gmail integration with Inbox, including accessibility and localization. Lightning Sync isn't available for new Salesforce customers.

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability

Sales reps can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. Sales reps can now log emails and events to Salesforce from Outlook Shared Folders and from Delegate Access Mailboxes. Lightning Sync isn't available for new Salesforce customers. Salesforce for Outlook retirement is delayed, and a phased retirement schedule is being introduced.

Salesforce CPQ and Billing: Dynamic Quote Fields, Asset Lifecycle Management, and Standalone Orders

In Salesforce CPQ, you can control quote fields dynamically. Salesforce Billing customers can now get insight into what customers have bought, and create standalone orders.

Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

High Velocity Sales: Einstein Call Coaching Enhancements, Sales Cadence Folders and Sharing, and Improved Sales Cadence Target Management

Call Coaching users can now see new insights and share voice calls. Organize and share sales cadences with folders, reassign targets to a different rep, pause targets in sales cadences, and use improved filters in the Work Queue.

High Velocity Sales and its features are available for an extra cost. For pricing details, contact your Salesforce account executive. Lightning Dialer is also available for an extra cost as an add-on license.

IN THIS SECTION:

Einstein Call Coaching: New Automatic Insights, Call Sharing, and More Reporting Features

We're debuting two new automatic insight types: challenges and trending terms. Call Coaching users can now share voice calls. There's also a barrelful of new features for Call Coaching Reporting and the voice call player, such as filtering dashboards by record and adjusting the playback rate for voice recordings.

Control Who Can Access Sales Cadences

Your sales managers and reps can now decide who can access which sales cadences and set the appropriate levels of access. Sales managers can organize sales cadences into folders for specific sales teams, products, or business units, and share these folders with sales reps or teams.

Hand Off Sales Cadence Targets to Another Rep

If a sales manager or rep wants to give in-progress targets to a different rep, they can update the target assignee without removing the target from the sales cadence.

Pause Sales Cadence Targets

When a target is out of the office, sales reps can pause the target's progress through the sales cadence so no outreach is wasted.

Filter Your Work Queue by Target Status

Sales reps can filter their work queue by the status of targets so that reps can prioritize their work more efficiently. With folders for organization and access control, and the ability to pause targets, reps see more target statuses in their work queues. Targets can have a status of Active, Paused, or Sales cadence access lost.

Stay Organized with a More Structured Work Queue

Sales reps can see sublists that group work queue items based on target status. The new sublists are paused targets and sales cadences that reps can no longer access.

Stay Focused with Session-Long Work Queue Filters

Help your reps manage their time more efficiently. After a rep filters their work queue, they can leave the tab and return to find their most recent curated list of sales cadences. Previously, reps selected their work queue filters every time they returned to the work queue tab.

Choose Which Number to Dial for Click-to-Call

Sales reps can improve interactions with customers by reaching them at the best number. When a record has multiple phone numbers listed, sales reps can choose which phone number to call. Previously, a phone number was automatically selected for reps.

Other Changes to High Velocity Sales

Learn about limits on automated emails and sales cadence targets, and new fields in the Sales Cadence Engagement dashboard and reports.

Einstein Call Coaching: New Automatic Insights, Call Sharing, and More Reporting Features

We're debuting two new automatic insight types: challenges and trending terms. Call Coaching users can now share voice calls. There's also a barrelful of new features for Call Coaching Reporting and the voice call player, such as filtering dashboards by record and adjusting the playback rate for voice recordings.

This feature is available with High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Call Coaching does not record your calls. Rather, you connect it with your recording system such as Lightning Dialer or other supported partners. It is a customer's responsibility to manage consent and comply with local privacy requirements in the way calls are recorded.

IN THIS SECTION:

See Insights Related to Challenges and Trending Terms

Call Coaching users can now access two new types of automatic insights: Challenges and Trending. Challenges highlight sales challenges with customers, and Trending indicates trending words and phrases.

Share Voice Calls

Managers and reps now can share voice calls with other users.

Do More with Call Coaching Dashboards

Sales managers can now filter Call Coaching dashboards by the related record. They can also see when the dashboard was last refreshed, reset filters with ease, and access voice calls with a single click.

Use More Call Player Features

Call Coaching users can speed up the playback of calls to listen to recordings faster. The call player displays the time of the call. Other contextual details including related record links and custom keyword text are also available.

Access Chatter from Voice Call Records

The Chatter component is now available by default on voice call records, so it's easier for sales reps to collaborate with their coworkers on calls.

Receive More Info in the Call Highlights Email

The updated Call Highlights email now includes record types and more contextual information. Also, clicking on a call in the email automatically jumps to the first mention in the player.

See More Setup Information

Salesforce admins now have more information and links available to them when setting up Call Coaching. They can see the setup status of the dashboards and assign permission sets with ease.

See Insights Related to Challenges and Trending Terms

Call Coaching users can now access two new types of automatic insights: Challenges and Trending. Challenges highlight sales challenges with customers, and Trending indicates trending words and phrases.

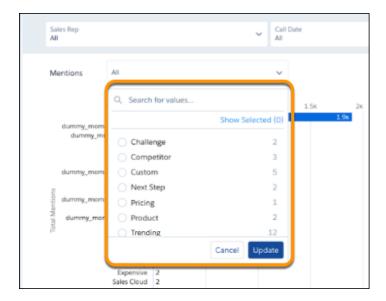
Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: Challenge insights detect common obstacles that sales reps face during sales calls such as price, time-related challenges, customer need, additional approval, and other challenge-related phrases.

Trending insights are recent words or phrases that appear in a significant pattern across calls and aren't covered by any existing custom or automatic insights. Emerging topics that were brought up frequently over the past week appear.

These insights are highlighted on voice records and with the Call Coaching dashboards. Managers can also filter by these insights to display relevant reports.



How: These insights are automatic and don't require any setup. Automatic and admin-configured insights can be accessed from the Call Insights page in Setup.

Share Voice Calls

Managers and reps now can share voice calls with other users.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: To share a call, select Share Voice Call from the voice call record.



Users receive a notification when calls are shared with them.

Access to the call recording player is limited to High Velocity Sales users. Other users can access record details but won't have access to the recording or related mentions.

Do More with Call Coaching Dashboards

Sales managers can now filter Call Coaching dashboards by the related record. They can also see when the dashboard was last refreshed, reset filters with ease, and access voice calls with a single click.

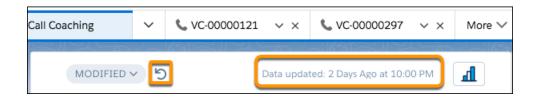
Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: Sales managers have more control over the type of data they can filter for. From the Overview and Mentions pages, they can filter dashboards by selecting either lead, contact, or account.



They can also click 🕽 to reset filters with ease and see the last time the dashboard was refreshed.



Voice calls and related records are accessible with a single click rather than clicking an extra dropdown to access records from dashboards.

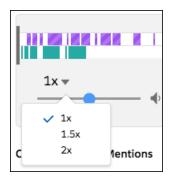
Use More Call Player Features

Call Coaching users can speed up the playback of calls to listen to recordings faster. The call player displays the time of the call. Other contextual details including related record links and custom keyword text are also available.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: Users can adjust the playback speed to 1.5 or 2 times the regular speed.



The time when calls were made is also displayed. And if call participants are related to an existing record, it's automatically linked from the player.



And custom keywords in the Mentioned section show the specific keyword text instead of just the group name.



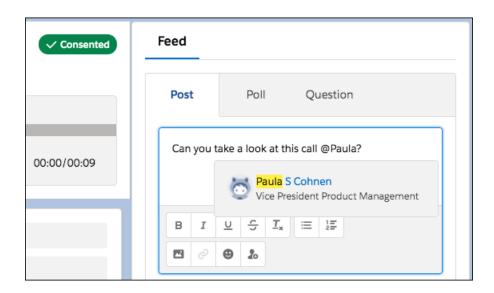
Access Chatter from Voice Call Records

The Chatter component is now available by default on voice call records, so it's easier for sales reps to collaborate with their coworkers on calls.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

How: Open a voice call record to view the Chatter feed, post, @mention colleagues, create tasks from feed items, link to records, and more.



The Chatter component is automatically added to the default page layout. If your org is using a custom layout for voice call records, you may need to add the component manually.

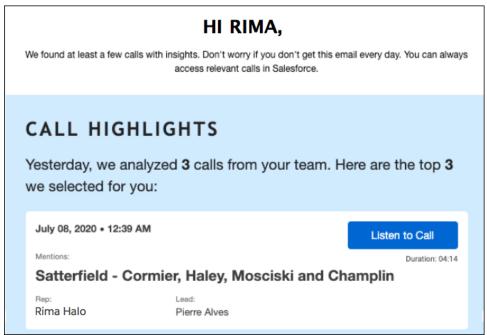
Receive More Info in the Call Highlights Email

The updated Call Highlights email now includes record types and more contextual information. Also, clicking on a call in the email automatically jumps to the first mention in the player.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: Call Highlights emails have an improved look. The new email format now shows the related rep and prospect, the record type, and other useful details.



Clicking on a call jumps to the first mention rather than starting at the beginning of the call.

Emails are now sent at 9:00 AM based on the time zone of the Salesforce org.

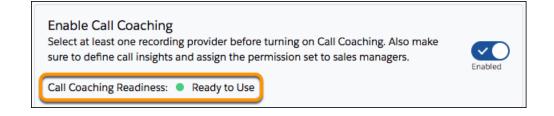
See More Setup Information

Salesforce admins now have more information and links available to them when setting up Call Coaching. They can see the setup status of the dashboards and assign permission sets with ease.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Why: Salesforce admins setting up Call Coaching have more information available about the status of the Call Coaching dashboards.



And now admins get more detailed instructions about assigning permission sets and links to the related setup pages.

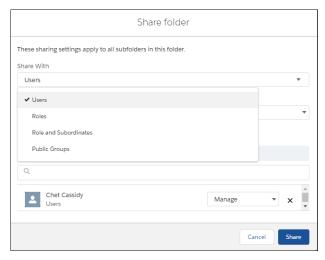
Control Who Can Access Sales Cadences

Your sales managers and reps can now decide who can access which sales cadences and set the appropriate levels of access. Sales managers can organize sales cadences into folders for specific sales teams, products, or business units, and share these folders with sales reps or teams.

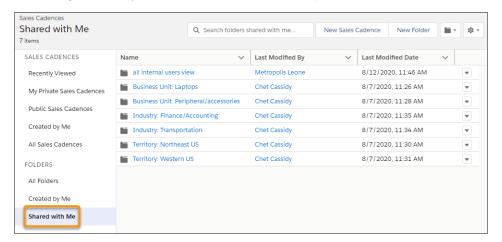
Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: Sales Cadence folders and folder sharing is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

Why: Companies with large sales teams and multiple territories or product groups can keep sales cadences organized and limit access to the right reps and teams. By controlling access to sales cadences, you can prevent sales reps from assigning targets to a sales cadence in the incorrect sales team or product line.



Sales managers can easily share folders with individual sales reps, teams, and roles.



The sales cadences view shows you the sales cadence folders you have access to.

Note: All existing sales cadences are in the Public Sales Cadences folder. To ensure that your users can access the sales cadences they need, create and share folders with the appropriate users and teams first. Next, move your sales cadences into those folders.

How: Ensure that the Update, Enable Enhanced Folder Sharing for Reports and Dashboards, is activated in Setup.

SEE ALSO:

Salesforce Help: Considerations for Setting Up High Velocity Sales (can be outdated or unavailable during release preview)
Salesforce Help: Select Who Can Use High Velocity Sales(can be outdated or unavailable during release preview)

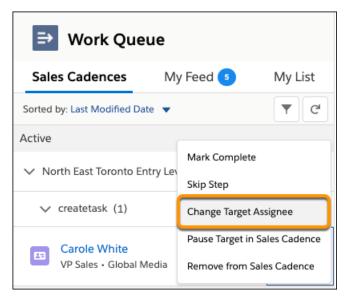
Hand Off Sales Cadence Targets to Another Rep

If a sales manager or rep wants to give in-progress targets to a different rep, they can update the target assignee without removing the target from the sales cadence.

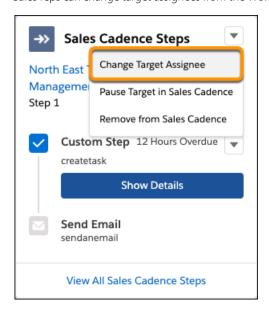
Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Why: When sales reps go on vacation, change roles, or simply want to do some load balancing, they can easily reassign targets to another rep.

How: In High Velocity Sales Setup, turn on **Change Sales Cadence Target Assignees**. By default this setting is off for existing orgs and on for new orgs. With this setting on, reports using the Action Cadence Tracker object's Owner ID field to show which reps complete sales cadence steps become inaccurate. Update these reports to use the Completed By field of the Action Cadence Step Tracker object instead.



Sales reps can change target assignees from the Work Queue or the Sales Cadence Steps component.



Pause Sales Cadence Targets

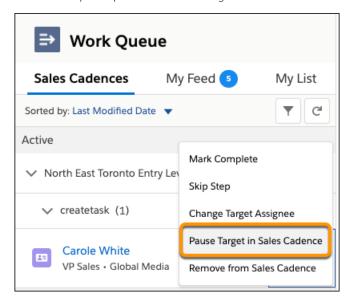
When a target is out of the office, sales reps can pause the target's progress through the sales cadence so no outreach is wasted.

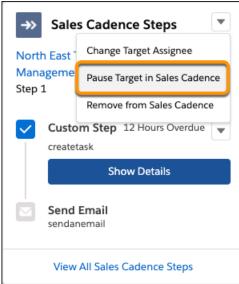
Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Why: Sales reps can pause targets who are on vacation, traveling, or ask the rep to temporarily hold off on contacting them.

Sales cadence reports now include a Targets Paused field showing the number of targets that were paused at each step in a sales cadence.

How: Sales reps can pause and resume targets from the Work Queue or the Sales Cadence Steps component.



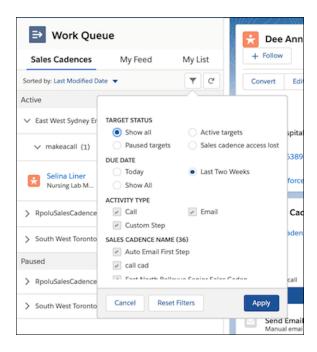


Filter Your Work Queue by Target Status

Sales reps can filter their work queue by the status of targets so that reps can prioritize their work more efficiently. With folders for organization and access control, and the ability to pause targets, reps see more target statuses in their work queues. Targets can have a status of Active, Paused, or Sales cadence access lost.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Why: Sales reps can focus on prospects that are currently moving through their sales cadence using the Active target filter. Reps can quickly resume a paused sales cadence using the Paused target filter. If reps no longer manage a target for any reason, they can reassign any related sales cadences to the rep taking over those targets.

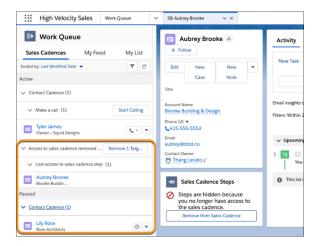


Stay Organized with a More Structured Work Queue

Sales reps can see sublists that group work queue items based on target status. The new sublists are paused targets and sales cadences that reps can no longer access.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Why: With the new sublists, sales reps can easily scan their sales cadences for targets to resume or reassign to another rep.



SEE ALSO:

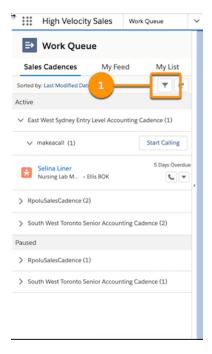
Salesforce Help: Considerations for Setting Up High Velocity Sales (can be outdated or unavailable during release preview)
Salesforce Help: Select Who Can Use High Velocity Sales (can be outdated or unavailable during release preview)

Stay Focused with Session-Long Work Queue Filters

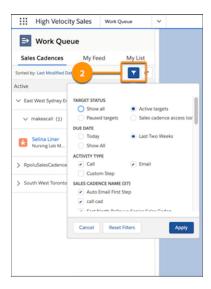
Help your reps manage their time more efficiently. After a rep filters their work queue, they can leave the tab and return to find their most recent curated list of sales cadences. Previously, reps selected their work queue filters every time they returned to the work queue tab.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

Why: A sales rep filters their work queue (1) by Active targets and closes the tab while they look over some prospect details.



When reps return to the work queue tab, they see that their sales cadences remain filtered by Active targets (2). The rep can start following up with the prospect they researched. Filters persist only throughout your current Salesforce session.

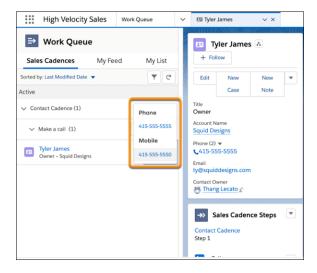


Choose Which Number to Dial for Click-to-Call

Sales reps can improve interactions with customers by reaching them at the best number. When a record has multiple phone numbers listed, sales reps can choose which phone number to call. Previously, a phone number was automatically selected for reps.

Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

How: Reps can choose the number for targets in a Call step in the sales cadence.



Other Changes to High Velocity Sales

Learn about limits on automated emails and sales cadence targets, and new fields in the Sales Cadence Engagement dashboard and reports.

IN THIS SECTION:

Daily Per-User Limit for Automated Email Was Introduced

The new daily sending limit is 1,000 automated emails per user.

Limit on Sales Cadence Active Targets Was Introduced

The limit of active targets in sales cadences is 150,000 per org. Previously, no limit applied.

See How Many Targets Were Paused on Each Sales Step

The new Targets Paused field shows sales managers and reps the total number of targets that were paused on a specific sales cadence step. The field appears in the Sales Cadence Engagement dashboard in the High Velocity Sales Performance app.

See Total Replies and Link Clicks in Reports

Let managers and reps see exactly how much engagement results from each email step and email template. The Sales Cadence Engagement and Email Template Engagement reports now include fields showing how many email opens, replies, and link clicks each email step and email template generates.

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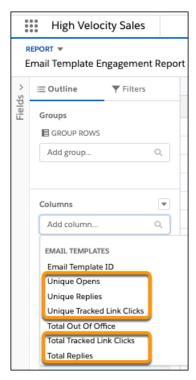
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Where: This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

How: New fields that show total engagement:

- Unique Opens
- Total Replies
- Unique Replies
- Total Tracked Link Clicks
- Unique Tracked Link Clicks

To add the fields to the layouts for the Sales Cadence Engagement and Email Template Engagement reports, add them to the list of visible columns.



To include the fields in custom report types, add them to the report layout on the Report Types page in Setup.

Salesforce Maps: Uber Integration, Territory Planning Alignment Comparisons, and Advanced Route Assignments for Account Teams

Ride with Uber when visiting nearby customers, get side-by-side comparisons for territory alignments and focuses, and plot shape layers using alignments of any size from Territory Planning. Assign routes to members of account teams in Salesforce Maps Advanced, and create data layers using data from sources outside Salesforce.

IN THIS SECTION:

Salesforce Maps: Field Safety, Uber Integration, and Lightning Components and Flows

Help your field reps minimize the risk of exposure to COVID-19. Get to your destination with Uber, plot shape layers from Territory Planning alignments, and map multiple records using the Map It button in Lightning Experience. Take advantage of Salesforce Lightning components and flows directly in Salesforce Maps. And include route travel times and distances on reports.

Salesforce Maps Territory Planning: Alignment Comparisons, Aggregated Data Sets, and Field Service Integration

Determine how changes to one alignment compare with another. Create aggregated data sets that represent many customers within specific locations. And plan map-based service territories for Field Service.

Salesforce Maps Advanced: Data Layers Using Outside Data Sources and Route Assignments Using Account Teams

Create data layers using data that you store elsewhere. Automate account assignment based on rules that you create for Salesforce account teams. And define chain- and franchise-specific visit windows that any of your reps can use.

Salesforce Maps: Field Safety, Uber Integration, and Lightning Components and Flows

Help your field reps minimize the risk of exposure to COVID-19. Get to your destination with Uber, plot shape layers from Territory Planning alignments, and map multiple records using the Map It button in Lightning Experience. Take advantage of Salesforce Lightning components and flows directly in Salesforce Maps. And include route travel times and distances on reports.

IN THIS SECTION:

Plan Customer Visits Safely

Help your field reps minimize the risk of exposure to COVID-19 when you provide helpful guidance from your company directly in Salesforce Maps with the field safety kit. Prompt your reps to review and agree to your company's guidelines for maximizing safety among employees and customers.

Get There with Uber

Leave the driving to Uber when visiting nearby customers. The Salesforce Maps feature Take Me There populates destinations in the Uber app on your field reps' mobile devices. In addition to any mapping apps, your reps now get the option to select Uber as a transportation method.

Extend Salesforce Maps with Lightning Components and Flows

Save your reps time and encourage them to follow business processes when you add Lightning components and flows to Salesforce Maps. For example, include mass actions within polygons and flows that trigger after checking out from visits.

Plot Shape Layers That Match Territory Planning Alignments

Plot shape layers based on territories of any size that you publish to Salesforce Maps.

Report On Route Travel Times and Distances

Analyze travel time and distance route data from Salesforce Maps using Salesforce reports.

Map Multiple Records from Lightning Experience

After you add the Salesforce Maps feature Map It to the Search layout, you can plot multiple records on the map using a list view in Lightning Experience.

Map New Shape Layers

Discover the shape layers available after Summer '20 in Salesforce Maps.

Other Enhancements in Salesforce Maps

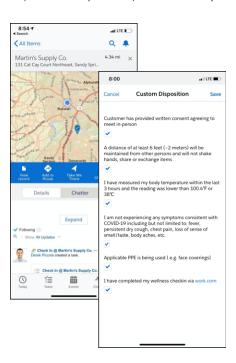
Access census data on the map, choose between two search methods for the results that work best for your company, and investigate bad addresses. But that's not all!

Plan Customer Visits Safely

Help your field reps minimize the risk of exposure to COVID-19 when you provide helpful guidance from your company directly in Salesforce Maps with the field safety kit. Prompt your reps to review and agree to your company's guidelines for maximizing safety among employees and customers.

Where: This change applies to Salesforce Maps in Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Encourage adoption of safe operating procedures and accountability when you automate workflows. The workflows prompt your reps to review and agree to safety items that matter to your company and your customers. Trigger safety processes with a custom disposition that you set up with items for your reps to check off when they arrive at and depart from visits.



How: Determine which safety items to include in your custom disposition. Involve your company's leaders and refer to your state and local governments for safety quidelines.

- 1. Create custom fields that represent your safety items.
- 2. Create events and tasks, posts for Chatter, and arrival alerts, for example, using check-in activity fields.
- **3.** Prompt your reps to review and agree to safety items using a custom disposition that you set up. Then automate the creation of activities and Chatter posts, for example, using check-in settings for Salesforce Maps base objects.

SEE ALSO:

Salesforce Help: Keep Field Reps Safe During Customer Visits

Get There with Uber

Leave the driving to Uber when visiting nearby customers. The Salesforce Maps feature Take Me There populates destinations in the Uber app on your field reps' mobile devices. In addition to any mapping apps, your reps now get the option to select Uber as a transportation method.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

How: Setup requirements differ depending on your reps' mobile devices. Here's how your reps get Uber to appear as an option for Take Me There.

On	Your Reps Do This
Apple devices	 From the map on Salesforce Maps Mobile, select Settings > Advanced Settings. For Handle Maps, select Use Uber.
	3. Save the settings.
Android devices	Nothing! Android operating systems require no setup for Uber to appear as an option on your reps' mobile devices.
	But if your reps already set up their devices to select a mapping application by default, they can remove that default to see the option for Uber.

Extend Salesforce Maps with Lightning Components and Flows

Save your reps time and encourage them to follow business processes when you add Lightning components and flows to Salesforce Maps. For example, include mass actions within polygons and flows that trigger after checking out from visits.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Including Lightning components and screen flows can help your sales and service teams with many processes that they already carry out in Salesforce. For example, when you add certain flows to Salesforce Maps, you:

- Let reps access downloaded Lightning components from AppExchange directly in Salesforce Maps.
- Help sales reps work their opportunities and easily create quotes adjusted for route distances using visual flows.
- Require teammates to complete your company's forms at specific points of sales and service visits.

How: From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**. Click **Configure** next to the Salesforce Maps package.

Select **Settings** > **Custom Actions**, and then create a custom action.

SEE ALSO:

Salesforce Help: Considerations for Deploying Flows with Packages

Plot Shape Layers That Match Territory Planning Alignments

Plot shape layers based on territories of any size that you publish to Salesforce Maps.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Report On Route Travel Times and Distances

Analyze travel time and distance route data from Salesforce Maps using Salesforce reports.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

How: To include travel distances and travel times for routes on reports, add the Maps Routes object to a custom report type. Then create a report using that report type, and include these new fields.

Travel Distance (Miles)

Travel Time (Min)

SEE ALSO:

Salesforce Help: Set Up a Custom Report Type

Map Multiple Records from Lightning Experience

After you add the Salesforce Maps feature Map It to the Search layout, you can plot multiple records on the map using a list view in Lightning Experience.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Sales and service reps no longer have to switch to Salesforce Classic to map records from a search list. When you set up the new Map It button, it works for both Lightning Experience and Salesforce Classic.



How: Add the Map It button to the Search layout using new Visualforce code.

SEE ALSO:

Knowledge Article: Add the Map It Button to a List View (can be outdated or unavailable during release preview)

Map New Shape Layers

Discover the shape layers available after Summer '20 in Salesforce Maps.

Where: This change applies to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Reps can map specific areas using new geographic boundaries.

Shape Layer	Type of Boundary
Argentina	Postal Codes
Austria	Bundesland
	Bezirk
Belarus	Rayon
Belgium	Gewest
Chad	Departement
	Region
Chile	Postal Codes

Shape Layer	Type of Boundary
Colombia	Postal Codes
Congo, Democratic Republic of The	District
	Province
Congo, Republic of The	District
	Departement
Costa Rica	Postal Codes
	Canton
	Provincia
Denmark	Kommune
Dominican Republic	Postal Codes
	Municipio
Ecuador	Canton
	Provincia
Egypt	Postal Codes
Faroe Islands	Kommuna
French Guiana	Postal Codes
	Departement
	Region
Guadeloupe	Postal Codes
	Departement
	Region
Hong Kong	Province
Iceland	Postal Codes
	Sveitarfelag
India	Postal Codes
Indonesia	Postal Codes
	Kota
Israel	Postal Codes
	Nafa
Japan	Postal Codes

	IOI ACCOUNT
Shape Layer	Type of Boundary
Luxembourg	Postal Codes
Malaysia	Districts
	Postal Codes
	States
Monaco	Postal Codes
New Zealand	Region Councils
Norway	Kommune
Panama	Distrito
	Provincia
Philippines	Postal Codes
Puerto Rico US Virgin Islands	Municipio
	Commonwealth
Saudi Arabia	Postal Codes
	Governorate
Singapore	Postal Codes
South Africa	Postal Codes
Sweden	Kommun
Taiwan	Postal Codes
	Settlement
Ukraine	Rayon
Venezuela	Postal Codes
	Municipio
Vietnam	Quan

SEE ALSO:

Knowledge Article: Salesforce Maps Shape Layer Maintenance Release Notes

Other Enhancements in Salesforce Maps

Access census data on the map, choose between two search methods for the results that work best for your company, and investigate bad addresses. But that's not all!

Where: These enhancements apply to Salesforce Maps in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Send route details through email, manage more settings in permission groups, and experience easier setup for Consumer Goods.

New Location for Auto Check Out Permissions

We moved the Auto Check Out permission from general settings to permission groups.

Keep in mind that in permission settings Auto Check Out is off by default. So if you turned on the permission in general settings, it's important that you turn it on in permission groups.

More Settings in Permission Groups

Permission	With this permission, you
Search type	Select either of these search methods.
	SOQL, which delivers search results that <i>contain</i> the search string.
	SOSL, which delivers search results that <i>start with</i> the search string.
	Each method delivers different results at different speeds.
Let users send routes through email	Indicate whether users can send route details to others through email.
Let users export bad addresses	Indicate whether users can export bad address details for further investigation.

Updated Census Data for the US

See the latest US census data on the map when you select the 2018 ACS 5yr, United States as the source for your data layer.

Streamlined Setup for Integration with Consumer Goods

Setting up Salesforce Maps for licensed Consumer Goods customers just got easier. Salesforce Maps now includes these base objects, which Consumer Goods uses.

- Visit
- Retail Store

Salesforce Maps Territory Planning: Alignment Comparisons, Aggregated Data Sets, and Field Service Integration

Determine how changes to one alignment compare with another. Create aggregated data sets that represent many customers within specific locations. And plan map-based service territories for Field Service.

IN THIS SECTION:

Compare Alignments

Analyze and compare one alignment with another in Salesforce Maps Territory Planning. For example, you can determine whether your current plan beats last year's. Or, you can see differences between their attributes, such as average units and average annual revenue.

Update Salesforce Fields with Territory Planning Data

Put your designed territories to use when you update account owners in Salesforce to match the account owners in sales and service territories. Store and update territory data in Salesforce fields when you publish the latest content from your alignments in Salesforce Maps Territory Planning.

Create Data Sets for Multiple Countries and Regions

Customize data sets with the countries and regions of your choice in Salesforce Maps Territory Planning.

Access and Restore Alignment Data

Review a history of alignments to see a list of changes in Salesforce Maps Territory Planning. Sales and service managers can capture alignment data at any point so they can continue refining it later or use it as a backup.

Plan Territories for Field Service

Create and update map-based service territories for Field Service using Salesforce Maps Territory Planning. Service operations can now publish alignments as service territories and polygons.

Aggregate Records for Big Data Sets

Plan territories for businesses that manage many customers. Create data sets in Salesforce Maps Territory Planning using a combination of reports and queries along with the option to aggregate records based on location. Aggregating data helps you create data sets that would otherwise exceed the maximum 250,000 records.

Discover New Containers

Review the containers available after Summer '20 in Salesforce Maps Territory Planning.

Other Enhancements in Salesforce Maps Territory Planning

Filter and search legends, configure publish settings in one place, preserve certain data when publishing to Enterprise Territory Management, and much more!

Compare Alignments

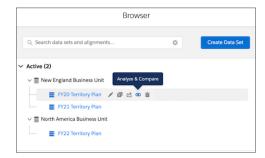
Analyze and compare one alignment with another in Salesforce Maps Territory Planning. For example, you can determine whether your current plan beats last year's. Or, you can see differences between their attributes, such as average units and average annual revenue.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Visible alignment attribute metrics give sales and service managers the critical information they need when comparing and creating equitable alignments. For example:

- See what's changed by comparing two alignments. See how the alignments differ on the map and compare their attributes side by side.
- Analyze the sums, averages, minimums, maximums, and standard deviation metrics for specific territories.
- Determine which alignment is the most logical and least disruptive for your team by comparing the difference and the percentage of change between two alignments.
- See if a new alignment created from Scenario Planning delivers on business results better than the original by comparing their metrics.
- Share comparisons in PDF files.

How: In Territory Planning, click Analyze & Compare next to the first alignment you want to compare.



Add a second alignment, then see them both on the map and compare their attributes.

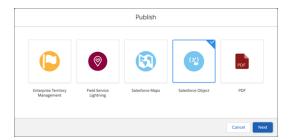


Update Salesforce Fields with Territory Planning Data

Put your designed territories to use when you update account owners in Salesforce to match the account owners in sales and service territories. Store and update territory data in Salesforce fields when you publish the latest content from your alignments in Salesforce Maps Territory Planning.

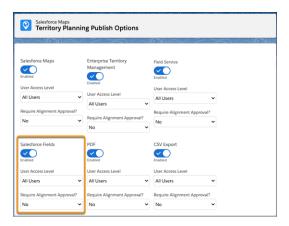
Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Whether you use map-based territories in Enterprise Territory Management or in Salesforce Maps, publish territory data directly to Salesforce fields. That way, you deliver the best sales and service experiences because you incorporate territory data into reports, forecasts, and other records.



How: From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**. Click **Configure** next to the Salesforce Maps package.

Under Territory Planning, select Publish Options, and then enable Salesforce Fields.



Anyone you grant authority to for publishing alignments can publish territory data to Salesforce fields.

Create Data Sets for Multiple Countries and Regions

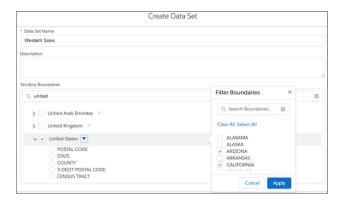
Customize data sets with the countries and regions of your choice in Salesforce Maps Territory Planning.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: When you want to plan territories that include more than one country or region in a country, now you can. For example, these new geographic allowances help sales and service managers:

- Assign reps to one territory that covers several countries.
- Avoid assigning reps to areas where the company doesn't do business by planning territories for smaller geographic regions in a country.
- Reduce the number of territories to track by assigning accounts from multiple countries to a specific rep.

How: While creating a data set, select an option, such as state, from the country you want to plan for. Then filter it to include the area you want.



Access and Restore Alignment Data

Review a history of alignments to see a list of changes in Salesforce Maps Territory Planning. Sales and service managers can capture alignment data at any point so they can continue refining it later or use it as a backup.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Give sales and service managers access to an alignment's history of changes so they can:

- Capture territory model and assignment values by taking a snapshot of the alignment for safekeeping. That way, managers can restore it to a previous milestone in the design process.
- Save their progress on a plan for later reference.
- See who made the last changes to the alignment so they know who to talk to about the changes.
- See when an alignment was last optimized, and decide whether it's time to optimize it again.

How: See tracked changes and create a snapshot from the History tab.



Plan Territories for Field Service

Create and update map-based service territories for Field Service using Salesforce Maps Territory Planning. Service operations can now publish alignments as service territories and polygons.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

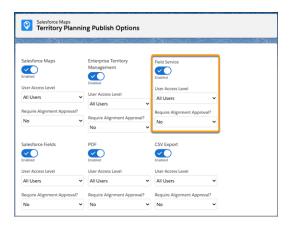
Who: Creating and updating map-based service territories is available to users with the Field Service managed package.

Why: Published territories create and update Field Service territories and polygons for adequate coverage.



How: From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**. Click **Configure** next to the Salesforce Maps package.

Under Territory Planning, select **Publish Options**, and then enable **Field Service**.



Anyone you grant authority to for publishing alignments can publish territory data to Field Service.

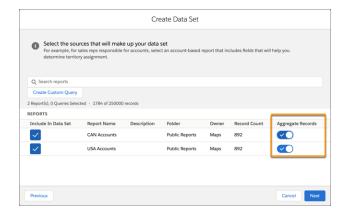
Aggregate Records for Big Data Sets

Plan territories for businesses that manage many customers. Create data sets in Salesforce Maps Territory Planning using a combination of reports and queries along with the option to aggregate records based on location. Aggregating data helps you create data sets that would otherwise exceed the maximum 250,000 records.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

How: When you import data, select any combination of reports and SOQL queries that pull together the Salesforce records that you want in your data sets. If Territory Planning prompts you to aggregate records, select the option for any of your sources. That way, the aggregated record amounts for data sets include no more than 250,000 records.

Select the option to aggregate records for your data sources.



If you choose not to aggregate records, exclude any sources that exceed data set capacities.

Discover New Containers

Review the containers available after Summer '20 in Salesforce Maps Territory Planning.

Where: This change applies to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Reps can map specific areas using new geographic boundaries.

Container	Type of Boundary
Argentina	Provincia
	Postal Codes
Austria	Bundesland
	Bezirk
	Postal Codes
Bahamas	Island
Belarus	Voblast
	Postal Codes
Belgium	Provincie
	Postal Codes
	Gewest
Belize	District
Benin	Departement
Bermuda	Postal Code
Bolivia	Provincia
	Departamento
Bosnia And Herzegovina	Region
	Postal Code
	Kanton
Brazil	Estado
	Regiao
	Postal Codes
Bulgaria	Postal Codes
	Oblast
Burundi	Province
Cameroon	Region
Cayman Islands	Postal Code
Central African Republic	Prefecture
Chad	Department
	Region

Container	Type of Boundary
Chile	Provincia
	Region
	Postal Codes
Colombia	Postal Codes
	Departmento
Comoros	Island
Congo, Democratic Republic Of The	District
	Province
Congo, Republic Of The	District
	Department
Cote D'Ivoire	Region
	District
Croatia	Postal Codes
	Zupanije
Cuba	Provincia
Czechia	Postal Codes
	Okres
	Kraj
Denmark	Postal Codes
	Kommune
Djibouti	Region
Dominican Republic	Postal Codes
	Municipio
Ecuador	Canton
	Provincia
Egypt	Postal Codes
	Mohafaza
El Salvador	Departamento
Equatorial Guinea	Provincia
Eritrea	Sub-Region

Container	Type of Boundary
	Region
Estonia	Postal Code
	Maakond
Ethiopia	Zone
	Region
Faroe Islands	Sysla
Finland	Postal Codes
	Avi
	Maakunta
French Guiana	Postal Codes
Greece	Postal Codes
	Nomos
	Perifereia
Guadeloupe	Postal Codes
	Department
	Region
Hong Kong	Province
Hungary	Postal Codes
	Jaras
	Megye
Iceland	Postal Codes
	Landshluti
India	Postal Codes
Ireland	Postal Codes
	Post Town
	Post County
Israel	Postal Code
	Mahoz
Italy	Postal Codes
	Provincia

Container	Type of Boundary
	Regione
Lithuania	Postal Codes
	Savivaldybe
	Apskritis
Luxembourg	Canton
	District
	Postal Codes
Malaysia	District
	Postal Codes
	State
Mexico	Municipio
	Postal Codes
Monaco	Postal Codes
Netherlands	Postal Codes
	Provincie
Norway	Postal Codes
	Fylke
Peru	Provincia
	Region
Poland	Postal Codes
	Powiat
	Wojewodztwo
Portugal	Postal Codes
	Concelho
Romania	Postal Codes
	Judet
Russia	Sub'ekt
	Postal Codes
	Okrug
Saudi Arabia	Postal Codes

for Account Teams

Container	Type of Boundary
	Governorate
Slovakia	Postal Codes
	Okres
	Kraj
South Africa	Postal Codes
	District Municipal
	Province
Spain	Postal Codes
	Provincia
	Autonomia
Sweden	Lan
	Postal Codes
Trinidad And Tobago	Island
Turkey	Postal Codes
	II
Ukraine	Rayon
	Postal Codes
United Arab Emirates	Emirate

SEE ALSO:

Knowledge Article: Salesforce Maps Territory Planning Container Sets Maintenance Release Notes

Other Enhancements in Salesforce Maps Territory Planning

Filter and search legends, configure publish settings in one place, preserve certain data when publishing to Enterprise Territory Management, and much more!

Where: These enhancements apply to Salesforce Maps Territory Planning in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Manage focuses with more control, get what you want from customized legends, and export territory and unit details for external systems.

Preserve Locked Units in Dissolved Territories

When you dissolve territories that include locked units, Territory Planning now removes any unlocked units but keeps the locked units in the territory.

Add Conditions and Aggregate Functions for Calculating Attributes

To give your teams more flexibility when calculating attributes, we added the conditional IF statement and these functions: SUM, AVG, MIN, and MAX.

Logic or Function	Example
IF statement	IF Unit Annual Revenue > 50000 return a value of 1
SUM function	Unit Annual Revenue / SUM Data Set Annual Revenue

Manage Focuses with Added Features

Working on focuses just got better. Sales and service leadership can now:

- Expand and collapse the focus tree for easier navigation.
- Show available territory details in the focus tree, including territory names, owners, and area descriptions.
- Search for territories by territory names and area details.
- Exclude units from the focus.

Get More Out of Legends

What to Care About	Benefit
Filter and search	Get better control of legends when you filter by field values. Search for split containers and locked units.
Tailor the view and the	Sales and service managers can now:
summary row	• Customize the summary row for any numeric attribute at any level using functions for SUM, AVG, MIN, MAX, and STD DEV.
	Wrap text fields.
	Freeze the unit name column.
Customize columns	Sales and service managers can now:
	Change data formats, summary rows, and column attributes.
	Remove columns.
	Rename attributes.
Show percentage of units in a focus	See each territory's units as a percentage of the focus, which helps sales and service operations understand how to distribute account assignments fairly.
Show a count of boundary and point postal codes	Quickly see how many boundary and point postal codes are in a territory. Then determine, for example, if you can publish to Enterprise Territory Management without simplifying rules or dividing the territory.

Save Time and Effort While Performing Tasks for Multiple Units and Areas

Sales and service operations get new options when selecting an area on the map.

- Create a territory.
- Remove unit assignments.

Dissolve units.

More Efficient Handling of Numeric Rules for Enterprise Territory Management

Territory Planning now gives sales and service teams options for handling territories that exceed criteria limits in rules that they publish to Enterprise Territory Management.

Option	Advantage		Consideration
Simplify rules	You avoid character limits for the criteria that make up the rules. Here's an example of simplifying a billing postal code rule.		For ZIP codes that include the same first 4 digits, Territory Planning converts those 5-digit ZIP codes into 4-digit ZIP codes.
	Not simplified	BillingPostalCode STARTS WITH 11040, 11041, 11042, 11043, 11044	If you require 5-digit ZIP codes in your rules, consider the next option.
	Simplified	BillingPostalCode STARTS WITH 1104	
Divide the territory into child territories	You preserve all numeric criteria in your rules for large territories. And you retain all details from your originally designed territory. Territory Planning divides your territory into multiple territories so that you can work around the character limits for the criteria that make up the rules.		Territory Planning divides territories into sequentially named child territories. For example, Northwest Territory divides into child territories: Northwest Territory 1 Northwest Territory 2 Northwest Territory 3

Preserve Certain Details When You Publish Updates to Enterprise Territory Management

We now retain these values when you publish territory updates to Enterprise Territory Management.

- Territory IDs
- The Forecast Manager setting
- Custom fields
- Territory access levels for accounts, opportunities, and cases
- Manually assigned accounts when you're not using the option Manually assign locked units to territories
- Non-matching assignment rules

Export Territory and Unit Details

If you export Territory Planning data for importing to third-party systems, you can now include these details in export .csv files.

- User IDs of territory owners in territory and unit legends
- Territory owners in territory legends
- Territory descriptions and parents in unit legends

Take Advantage of Visible Point Postal Codes

We now show point postal codes in the map legend to help you:

- Take the total number of postal codes into account when planning and publishing a territory and considering rule criteria limits.
- See how many point codes are inside a boundary code.
- Export point codes to third-party systems in .csv files.

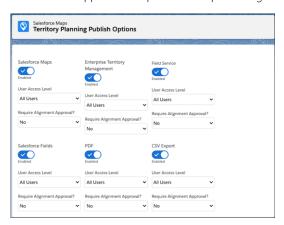
Configure Publish Settings

The new Publish Options page lets you manage these publish settings from one place.

• Enable publishing.

Alignment Comparisons, and Advanced Route Assignments for Account Teams

- Select who can use each publish method, users with the Editor permission or users with the Approver permission.
- Indicate if approval is required before publishing.



Salesforce Maps Advanced: Data Layers Using Outside Data Sources and Route **Assignments Using Account Teams**

Create data layers using data that you store elsewhere. Automate account assignment based on rules that you create for Salesforce account teams. And define chain- and franchise-specific visit windows that any of your reps can use.

IN THIS SECTION:

Create Data Layers from Outside Data Sources

Build data layers in Salesforce Maps Advanced using sources that you store or work with outside of Salesforce. For example, you can import an external .csv file that contains your leads, customers, delivery details, addresses, or latitudes and longitudes.

Assign Routes to Members of Account Teams

Save maintenance time when rep assignments change. Account Teams, available directly in Salesforce Maps Advanced, makes it easy to assign routes to reps that you select from related objects, such as Account Team Member.

Define Visit Windows for Your Reps

Help your sales reps save time and honor customers' visit windows by creating predefined visit windows for specific chains and franchises. For example, you or your sales and service operations create windows that restrict visits during certain hours. Your reps apply those visit windows to the accounts that they sell to and serve.

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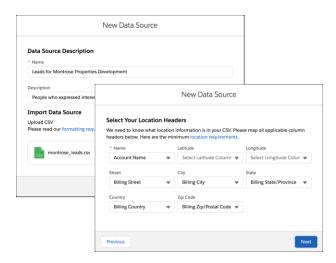
Where: This change applies to Salesforce Maps Advanced in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who: This feature is available to users with the Manage Data permission in Salesforce Maps.

How: In Salesforce Maps, create a data layer, and click **Add a Data Source**.



When prompted, log in to production, and then create a data source, during which you upload a .csv file.



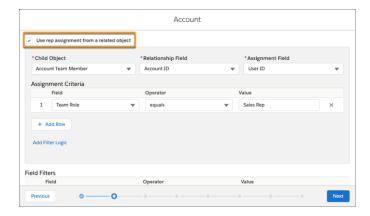
Map data from the .csv file to your fields. Then, apply formats to the column headers. You're now ready to plot the data source.

Assign Routes to Members of Account Teams

Save maintenance time when rep assignments change. Account Teams, available directly in Salesforce Maps Advanced, makes it easy to assign routes to reps that you select from related objects, such as Account Team Member.

Where: This change applies to Salesforce Maps Advanced in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

How: To assign users from different objects, such as Account Team Member, edit a data set in a visit plan. Select **Use rep assignment from a related object**.



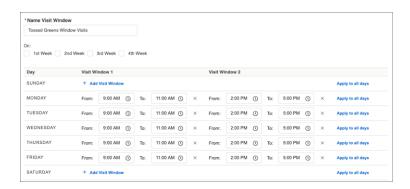
Then, select the child object that contains the relationship and assignment fields for account teams. Define the assignment criteria for relevant team roles.

Define Visit Windows for Your Reps

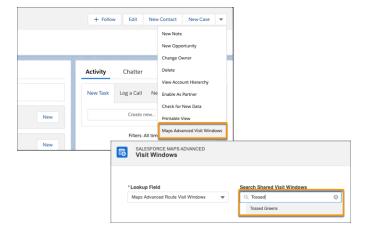
Help your sales reps save time and honor customers' visit windows by creating predefined visit windows for specific chains and franchises. For example, you or your sales and service operations create windows that restrict visits during certain hours. Your reps apply those visit windows to the accounts that they sell to and serve.

Where: This change applies to Salesforce Maps Advanced in Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer Editions.

How: To create predefined visit windows, select the **Maps Advances Shared Visit Windows** tab. Add a descriptive name, and then define the visit windows.



From an account record in Salesforce, your reps select Maps Advanced Visit Windows, and then search for visit windows that they want to apply to the account.



Sales Cloud Einstein: More Control of the Opportunity Scoring Model, Global Models for Lead Scoring, and Big Improvements to Einstein Activity Capture

When setting up Einstein Opportunity Scoring, choose to have Einstein look only at certain opportunity records and custom fields. Use Einstein Lead Scoring even when you don't have enough data of your own. And get more out of Einstein Activity Capture with new connection and configuration options.

IN THIS SECTION:

Optimize the Opportunity Scoring Model

Fine-tuning your scoring model can yield more accurate scores. When setting up Einstein Opportunity Scoring, you can choose to have Einstein look only at opportunities that meet certain conditions. Also, decide if you want Einstein to exclude any custom opportunity fields from the scoring model.

Enable Einstein Lead Scoring with Less Data

Salesforce organizations with smaller data sets can now enable Einstein Lead Scoring. Einstein takes advantage of a global scoring model that uses anonymous aggregated data to allow smaller orgs to score their leads. When an organization generates enough of its own data, Einstein switches to a scoring model built only with that data.

See Key Factors with Renamed Opportunity Field Labels

When your team sees field labels that they're familiar with, key factors are easier to understand. Now, if you rename opportunity field labels, the key factors now reference the new field label instead of the standard label.

Additional Users Permission for Setting Up Opportunity and Lead Scoring

The View All Profiles permission is now required when enabling or disabling Einstein Opportunity Scoring and Einstein Lead Scoring. Previously, you needed only the Customize Application and Modify All Data user permissions.

Take It to the Next Level with Einstein Activity Capture

If you use Microsoft Office 365, you can now connect all your Einstein Activity Capture users to Salesforce at once. Set your configuration to sync events and contacts only from Salesforce to the connected account. Or you can stop contact and event data from moving between applications altogether. Reps know when action is needed thanks to the new Request email insight. Plus, we made improvements to how emails and events are shared, made it easier to add users to a configuration, and enhanced the Activities dashboard.

Optimize the Opportunity Scoring Model

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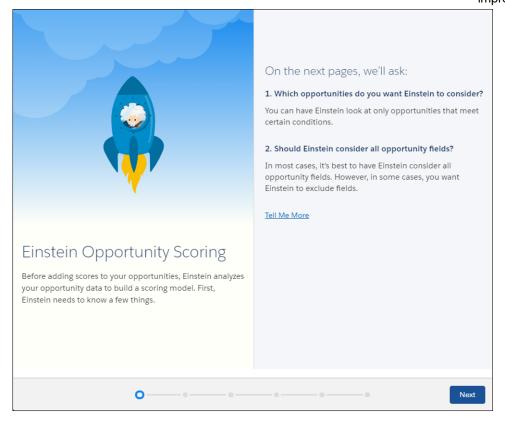
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

How: Open the Einstein Opportunity Scoring setup page. Click **Set Up** or **Review Settings**, depending on which option is available. Follow the prompts to filter opportunity records and exclude custom opportunity fields.



Note: Fields that are excluded through the Einstein Forecasting setup no longer affect the opportunity scoring model. If you were previously excluding fields for the opportunity scoring model through Einstein Forecasting or from a special request made to Salesforce, we keep your existing settings until you make changes. However, your existing settings aren't reflected in setup. We recommend that you update the settings with your record and field exclusion preferences.



SEE ALSO:

Salesforce Help: Enable Einstein Opportunity Scoring (can be outdated or unavailable during release preview)
Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Enable Einstein Lead Scoring with Less Data

Salesforce organizations with smaller data sets can now enable Einstein Lead Scoring. Einstein takes advantage of a global scoring model that uses anonymous aggregated data to allow smaller orgs to score their leads. When an organization generates enough of its own data, Einstein switches to a scoring model built only with that data.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Why: Previously, the Einstein Readiness Assessor required 1000 new leads and 120 lead conversions in the previous 6 months. Now the assessor allows all organizations to turn on Einstein Lead Scoring.

How: To see whether your Salesforce organization is ready to use a global model or a single-customer model, run the Einstein Readiness Assessor from Setup.

SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Salesforce Help: Run the Sales Cloud Einstein Readiness Assessor (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: Salesforce Einstein: Global Model Opt-Out Process (can be outdated or unavailable during release preview)

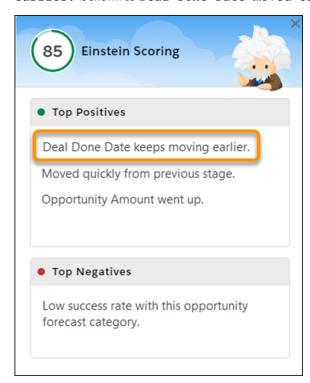
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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

Why: For example, if you change the opportunity **Closed Date** field to **Deal Done Date**, the key factor Close date moved earlier. is shown as Deal Done Date moved earlier.



SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

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SEE ALSO:

Einstein Activity Capture: New Connection Options, More Control Over How Data Flows, and a New Email Insight
Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization
Is Generally Available

Core Sales Features: Opportunity Deal Change Highlights and Mobile Forecasting

Quickly find the opportunities that changed in the last week. More mobile users get Collaborative Forecasts, now available for Android and iOS. Manually assign a territory to a new opportunity in fewer steps. And running custom application logic on orders is easier.

IN THIS SECTION:

Opportunities: More Options for Managing Deals, and Improvements to Einstein Opportunity Scoring

Opportunity deal change highlights point out recently changed amounts and close dates. And a new Einstein Opportunity Scoring setup gives you more control of how opportunities are scored.

Collaborative Forecasts: More Options for Mobile Forecasting and Inline Editing

Mobile forecasting is no longer limited to iOS devices. And the opportunity list on the forecasts page now supports inline editing for the Stage column.

Enterprise Territory Management: Assign a Territory to a New Opportunity in Fewer Steps

Users can now assign a territory while they're creating an opportunity. Previously, they saved a new opportunity and then edited it.

Orders: New Behavior for Saving Orders (Update)

Now it's easier to run custom application logic on orders. Salesforce evaluates custom application logic when a new order product or edited order product causes a change to the parent order.

Other Changes in Core Sales Features

We now support PK chunking for the ObjectTerritory2Association object. And the original territory management feature is scheduled for retirement in Summer '21.

Opportunities: More Options for Managing Deals, and Improvements to Einstein Opportunity Scoring

Opportunity deal change highlights point out recently changed amounts and close dates. And a new Einstein Opportunity Scoring setup gives you more control of how opportunities are scored.

IN THIS SECTION:

Find Changed Deals at a Glance

Opportunity deal change highlights help your sales team prioritize work by showing recent changes to amounts and close dates. For example, knowing which deals changed helps sales managers with their weekly coaching sessions. In the opportunities list view and Kanban view, text colors and arrows indicate amounts and close dates that changed during the last 7 days. And users can hover over an arrow to get details.

Enjoy Improvements to Einstein Opportunity Scoring

Fine-tune your scoring model to help get more accurate scores. If you rename opportunity field labels, the key factors now reference the new field label instead of the standard label.

SEE ALSO:

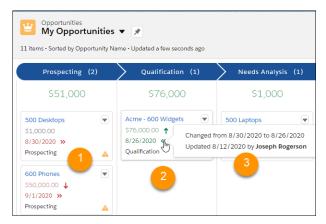
Update Opportunity Stages on the Forecasts Page in Lightning Experience
Enterprise Territory Management: Assign a Territory to a New Opportunity in Fewer Steps

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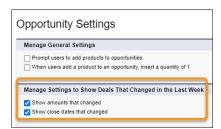
Where: This change applies to Lightning Experience in Unlimited Edition.

Why: Changes to opportunity amounts and close dates now show motion indicators for 7 days.



Red text and arrows indicate amounts that decreased and close dates that were pushed out (1). Green text and arrows indicate amounts that increased and close dates that were pulled in (2). Hover over an arrow to see what changed, who changed it, and when (3).

How: Opportunity deal change highlights are turned on by default, but you can turn them off (and back on) via Opportunity Settings in Setup.



Enterprise API and Metadata API support opportunity deal change highlights.

SEE ALSO:

Salesforce Help: Manage Settings to Show Changed Deals (can be outdated or unavailable during release preview)

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Fine-tune your scoring model to help get more accurate scores. If you rename opportunity field labels, the key factors now reference the new field label instead of the standard label.

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Who: Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

SEE ALSO:

Optimize the Opportunity Scoring Model

See Key Factors with Renamed Opportunity Field Labels

Additional Users Permission for Setting Up Opportunity and Lead Scoring

Collaborative Forecasts: More Options for Mobile Forecasting and Inline Editing

Mobile forecasting is no longer limited to iOS devices. And the opportunity list on the forecasts page now supports inline editing for the Stage column.

IN THIS SECTION:

Get Forecasts on the Go

Now that mobile forecasting is available for Android devices, more users can see forecasts on the go. Previously, mobile forecasting was available only on iOS devices.

Update Opportunity Stages on the Forecasts Page in Lightning Experience

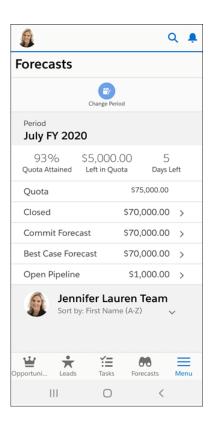
Forecasts users can now update stages in the opportunity list without leaving the forecasts page. Previously, inline editing was available for other fields, but not for Stage.

Get Forecasts on the Go

Now that mobile forecasting is available for Android devices, more users can see forecasts on the go. Previously, mobile forecasting was available only on iOS devices.

Where: This change applies to the Salesforce mobile app for Android in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: Android users can now access read-only opportunity revenue forecasts on their devices.



SEE ALSO:

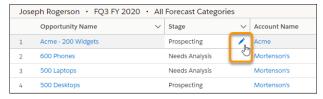
Salesforce Help: Collaborative Forecasts: What's Different or Not Available in the Salesforce Mobile App (can be outdated or unavailable during release preview)

Update Opportunity Stages on the Forecasts Page in Lightning Experience

Forecasts users can now update stages in the opportunity list without leaving the forecasts page. Previously, inline editing was available for other fields, but not for Stage.

Where: This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: Users can click the pencil icon to edit an opportunity's stage.



1

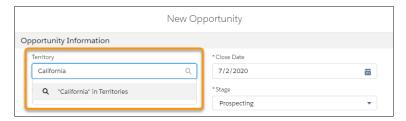
Note: Inline editing isn't available if Stage is a controlling or dependent picklist field.

Enterprise Territory Management: Assign a Territory to a New Opportunity in Fewer Steps

Users can now assign a territory while they're creating an opportunity. Previously, they saved a new opportunity and then edited it.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: While creating an opportunity, select a territory to assign it. Only territories from the active territory model are available.



SEE ALSO:

Salesforce Help: Assign a Territory Manually to an Opportunity (can be outdated or unavailable during release preview)

Orders: New Behavior for Saving Orders (Update)

Now it's easier to run custom application logic on orders. Salesforce evaluates custom application logic when a new order product or edited order product causes a change to the parent order.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic.

Why: Previously, Salesforce didn't run custom application logic when an order product update caused a change to the parent order. For example, it didn't run logic when a new order product caused a change to the order's total amount. Users who wanted to enforce custom applications in these scenarios required further customizations for a workaround.

How: Go to the Enable New Order Save Behavior release update tile and click **Enable Test Run**.

When the New Order Save Behavior is active, Salesforce evaluates and runs the following customizations whenever an order product update changes the parent order.

- Order and order product validation rules
- Order and order product Apex triggers and classes
- Order and order product workflow rules
- Flows, including processes

Important:

- Packages created before Winter '21 don't support the New Order Save Behavior release update by default. Package providers should test and configure their packages to support the new behavior.
- If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.
- Salesforce CPQ and Salesforce Billing don't support the New Order Save Behavior in Winter '21.
- Salesforce enforces New Order Save Behavior in all orgs in Summer '22.

SEE ALSO:

Developer Documentation: Test and Respond to the New Order Save Behavior (can be outdated or unavailable during release preview)

Knowledge Article: Order Save Behavior Update (can be outdated or unavailable during release preview)

Salesforce Help: New Order Save Behavior (can be outdated or unavailable during release preview)

Other Changes in Core Sales Features

We now support PK chunking for the ObjectTerritory2Association object. And the original territory management feature is scheduled for retirement in Summer '21.

IN THIS SECTION:

PK Chunking Support Added for ObjectTerritory2Association

With PK chunking, you get better performance and reliability while using the API to extract large data sets from the ObjectTerritory2Association object.

Original Territory Management Is Being Retired

The original territory management feature is scheduled for retirement as of Summer '21. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management.

PK Chunking Support Added for ObjectTerritory2Association

With PK chunking, you get better performance and reliability while using the API to extract large data sets from the ObjectTerritory2Association object.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

Salesforce Developers: Use PK Chunking to Extract Large Data Sets from Salesforce
Salesforce Developers: PK Chunking Header (can be outdated or unavailable during release preview)

Original Territory Management Is Being Retired

The original territory management feature is scheduled for retirement as of Summer '21. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management.

Where: This change applies to Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: Review our documentation and follow the instructions for setting up Enterprise Territory Management.



Note: Customizable Forecasting was retired as of Summer '20. Original territory management users can't access the Customizable Forecasting feature and its underlying data, but forecast managers retain access granted to opportunities and territories. If you were using Customizable Forecasting, we encourage you to migrate to Collaborative Forecasts.

SEE ALSO:

Knowledge article: The Original Territory Management Module Will Be Retired in the Summer '21 Release

Productivity Features: Einstein Activity Capture Enhancements, Schedule Meetings More Easily, and New Email Template Builder

Einstein Activity Capture has several enhancements, such as new sync options and the new Request email insight. Sales reps can include suggested meeting times in their emails by choosing available times from their calendar. Recipients choose from among the suggested times, making it easier to set up meetings. And reps have a new option for easily and quickly creating engaging email templates with Email Template Builder. Visual tools make it efficient to add components like HTML and images.

IN THIS SECTION:

Einstein Activity Capture: New Connection Options, More Control Over How Data Flows, and a New Email Insight

If you use Microsoft Office 365, you can now connect all your Einstein Activity Capture users to Salesforce at once. Set your configuration to sync events and contacts only from Salesforce to the connected account. Or you can stop contact and event data from moving between applications altogether. Reps know when action is needed thanks to the new Request email insight. Plus, we made improvements to how emails and events are shared, made it easier to add users to a configuration, and enhanced the Activities dashboard.

Email Experience: Use Insert Availability, Schedule List Emails, and Streamlined Bounce Alerts

Sales reps can now insert calendar availability in emails, making meetings easier to schedule. Email recipients choose their preferred meeting time from the available choices and the meeting is created automatically. Reps can also schedule their list emails so that they arrive at a specific date and time. And bounce alerts now appear on all records that have the same email address.

Email Templates: Email Template Builder

Quickly and easily create email templates with Email Template Builder's visual tools.

Salesforce Inbox Mobile: Smarter Selling from Your Inbox

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

WDC: A New Name

All instances of Work.com are now rebranded as WDC.

Einstein Activity Capture: New Connection Options, More Control Over How Data Flows, and a New Email Insight

If you use Microsoft Office 365, you can now connect all your Einstein Activity Capture users to Salesforce at once. Set your configuration to sync events and contacts only from Salesforce to the connected account. Or you can stop contact and event data from moving between applications altogether. Reps know when action is needed thanks to the new Request email insight. Plus, we made improvements to how emails and events are shared, made it easier to add users to a configuration, and enhanced the Activities dashboard.

IN THIS SECTION:

Connect Microsoft Office 365 to Salesforce in More Ways

If you use Einstein Activity Capture with Microsoft Office 365, you can now connect to Salesforce with an org-level connection or a service account. Both connection methods provide the security of OAuth 2.0. Plus, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

Control How Data Flows Between Salesforce and the Connected Account

When setting up an Einstein Activity Capture configuration, you can stop event or contact data from moving between Salesforce and the connected Microsoft or Google account. Plus, you now can sync event and contact data only from Salesforce to the connected account.

Know When a Prospect or Contact Has a Request for You with Email Insight

The new Request insight lets reps know when they have specific action items. This insight appears when a prospect or contact indicates a request and the sales rep wants to follow up.

Prevent New Users from Changing the Default Sharing Setting

If you set the Einstein Activity Capture default sharing setting to Don't Share, you can prevent new Einstein Activity Capture users from changing it. By enforcing the sharing setting, you ensure that sensitive information is kept private.

Add Users to a Configuration More Easily

When adding users to an Einstein Activity Capture configuration, you see up to 500 users listed. Previously, only 100 users were listed. Also, your most recent assignment changes, whether they're made in setup or through the API, are used.

Keep Settings and Configurations When You Turn Off Einstein Activity Capture

To make sure that you don't run into unexpected issues, we distinguished the behavior for turning off and resetting Einstein Activity Capture.

Enjoy Enhancements to the Activities Dashboard

If you create contact records for internal users, customer activities no longer roll up to these internal contacts. As a result, the activities for accounts and opportunities in the dashboard reflect the true number of customer interactions. Plus, only completed tasks are included in the dashboard, which gives you a clearer look at your team's progress. Previously, incomplete tasks, including those with due dates within the selected time range, were also included in the dashboard.

Avoid Cluttering the Activity Timeline with Internal Activity

Salesforce continues to add your default internal domain to the Excluded Address list. Now you can't delete the default internal domain from the list. By keeping the timeline focused on customer interactions, the timeline is free from noise and performance remains high.

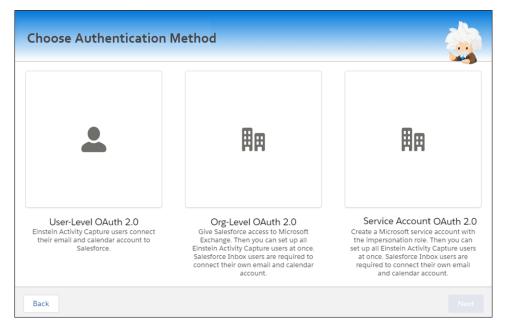
Connect Microsoft Office 365 to Salesforce in More Ways

If you use Einstein Activity Capture with Microsoft Office 365, you can now connect to Salesforce with an org-level connection or a service account. Both connection methods provide the security of OAuth 2.0. Plus, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

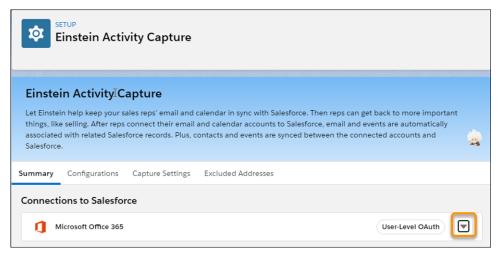
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Why: Both authentication options make it easier for you to set up many users because users don't connect their own Microsoft Office 365 account to Salesforce. Plus, service accounts give you more control over which users Salesforce can access data from.

How: When setting up Einstein Activity Capture for the first time, select Org-Level OAuth 2.0 or Service Account OAuth 2.0 as the authentication method.



If you already set up Einstein Activity Capture, you can reset the feature and select a different authentication method. From the Einstein Activity Capture settings page, select Reset Einstein Activity Capture from the dropdown. After the reset process is complete, set up Einstein Activity Capture again. You're prompted to select the authentication method.



Note: Users in configurations that capture email data are prompted to accept the Einstein Activity Capture terms of service. Until they do so, email data isn't captured.

SEE ALSO:

Salesforce Help: Connect to Einstein Activity Capture with Org-Level OAuth 2.0 (can be outdated or unavailable during release preview)
Salesforce Help: Connect to Einstein Activity Capture with a Service Account OAuth 2.0 (can be outdated or unavailable during release preview)

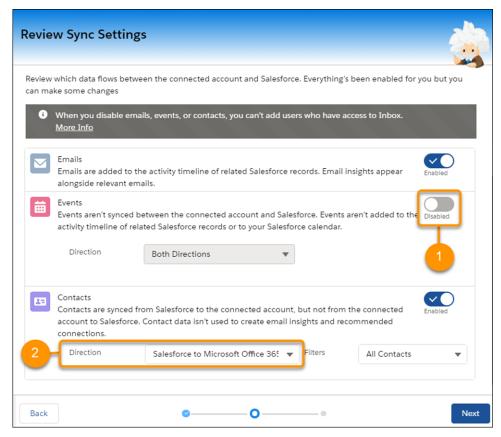
Control How Data Flows Between Salesforce and the Connected Account

When setting up an Einstein Activity Capture configuration, you can stop event or contact data from moving between Salesforce and the connected Microsoft or Google account. Plus, you now can sync event and contact data only from Salesforce to the connected account

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Why: Being able to control how Einstein Activity Capture interacts with your data helps Salesforce meet your company's unique business needs.

How:



To stop all contact or event data from moving between Salesforce and the connected accounts, go to the Einstein Activity Capture configuration. Then, disable events or contacts (1).

To stop contact or event data from moving from the connected account to Salesforce, go to the Einstein Activity Capture configuration. Then, for either events or contacts, select the direction that indicates data moves from Salesforce to your connected account (2). The event or contact data is synced from Salesforce to the connected account, but not from the connected account to Salesforce.

The capture functionality—which gathers event data from the connected account, stores it, and adds it to the activity timeline of related Salesforce records and to your Salesforce calendar—stops. Contact data, which is used to create email insights and recommended connections, also stops being captured from the connected account.



Note: You can't disable events or contacts for Einstein Activity Capture users who have access to Inbox. Event and contact data is used for Inbox productivity features, such as Insert Availability and Recommended Connections.

SEE ALSO:

Salesforce Help: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Know When a Prospect or Contact Has a Request for You with Email Insight

The new Request insight lets reps know when they have specific action items. This insight appears when a prospect or contact indicates a request and the sales rep wants to follow up.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: This feature is available to all Einstein Activity Capture users including users with an Inbox license.

How: Email Insights are available when you turn on Einstein Activity Capture. If you use Einstein Activity Capture through a Sales Cloud Einstein or Inbox license, Email Insights are on by default. View this insight in the email details, on the activity timeline, and in Salesforce Inbox mobile apps.

Prevent New Users from Changing the Default Sharing Setting

If you set the Einstein Activity Capture default sharing setting to Don't Share, you can prevent new Einstein Activity Capture users from changing it. By enforcing the sharing setting, you ensure that sensitive information is kept private.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: From the Einstein Activity Capture settings page, click the Capture Settings tab. Then, turn on the **Enforce Default Activity Sharing for New Users** setting. Users can still share individual emails and events, and respond to sharing requests from other users.

Enforce Default Activity Sharing for New Users



Require new Einstein Activity Capture users to keep their activity sharing setting as Don't Share. Users can still share individual emails and events, and respond to sharing requests from other users.

SEE ALSO:

Salesforce Help: Set Default Activity Sharing for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Add Users to a Configuration More Easily

When adding users to an Einstein Activity Capture configuration, you see up to 500 users listed. Previously, only 100 users were listed. Also, your most recent assignment changes, whether they're made in setup or through the API, are used.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: From the Einstein Activity Capture settings page, click the Configurations tab. Create or edit a configuration, and then assign users.

SEE ALSO:

Salesforce Help: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Keep Settings and Configurations When You Turn Off Einstein Activity Capture

To make sure that you don't run into unexpected issues, we distinguished the behavior for turning off and resetting Einstein Activity Capture.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Why: Now, when you turn off Einstein Activity Capture, the following happens.

- Your configurations and settings are saved.
- Contacts and events stop syncing for all users.

- All previously captured emails and events are hidden from the activity timeline and the Salesforce calendar. The Activities dashboard isn't available.
- Previously captured data and new data is still stored outside of Salesforce.

The existing behavior for resetting Einstein Activity Capture remains the same.

- Your selected email and calendar service is removed.
- Your configurations and settings are deleted.
- Contacts and events stop syncing for all users.
- User-level connections continue to be used for capturing emails, events, and contacts.

SEE ALSO:

Salesforce Help: Enable and Disable Einstein Activity Capture (can be outdated or unavailable during release preview)
Salesforce Help: Reset Einstein Activity Capture (can be outdated or unavailable during release preview)

Enjoy Enhancements to the Activities Dashboard

If you create contact records for internal users, customer activities no longer roll up to these internal contacts. As a result, the activities for accounts and opportunities in the dashboard reflect the true number of customer interactions. Plus, only completed tasks are included in the dashboard, which gives you a clearer look at your team's progress. Previously, incomplete tasks, including those with due dates within the selected time range, were also included in the dashboard.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Review the Activities Dashboard (can be outdated or unavailable during release preview)

Avoid Cluttering the Activity Timeline with Internal Activity

Salesforce continues to add your default internal domain to the Excluded Address list. Now you can't delete the default internal domain from the list. By keeping the timeline focused on customer interactions, the timeline is free from noise and performance remains high.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: You can see which internal domain was automatically added to the Excluded Addresses list. From the Einstein Activity Capture settings page, click the Excluded Addresses tab. The delete option is no longer available next to the default internal domain.

SEE ALSO:

Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture (can be outdated or unavailable during release preview)

Email Experience: Use Insert Availability, Schedule List Emails, and Streamlined Bounce Alerts

Sales reps can now insert calendar availability in emails, making meetings easier to schedule. Email recipients choose their preferred meeting time from the available choices and the meeting is created automatically. Reps can also schedule their list emails so that they arrive at a specific date and time. And bounce alerts now appear on all records that have the same email address.

IN THIS SECTION:

Easily Coordinate When to Meet with Insert Availability in Lightning Experience

When emailing someone to set up a meeting, your reps can include their available time slots. The email recipient then selects from among the choices, and the meeting is automatically added to everyone's calendar. No more back-and-forth emails to land on the best moment to meet.

Send List Emails at the Ideal Time

Reps can now schedule when to send a list email. Choose an ideal date and time to ensure that the list email has the best chance of being read. For example, schedule a list email to arrive at the beginning of the work day. Scheduling was previously available for individual emails only.

Create Larger Emails with New Maximum Size of 35 MB

We increased the maximum size of outbound and inbound emails from 25 MB to 35 MB. The size of an email message includes the email headers, body, attachments, and encoding. Email size can also vary depending on character set.

Default Email Encoding Changing to UTF-8

For new Salesforce orgs, the default email encoding for templates, footers, and user email settings is changing to 8-bit Unicode Transformation Format (UTF-8). This update is to support Email Address Internationalization.

Streamline Contacts and Leads with Default Bounce Alerts

When bounce processing is enabled, bounce alerts now appear for all Contacts and Leads with the same email address.

Easily Coordinate When to Meet with Insert Availability in Lightning Experience

When emailing someone to set up a meeting, your reps can include their available time slots. The email recipient then selects from among the choices, and the meeting is automatically added to everyone's calendar. No more back-and-forth emails to land on the best moment to meet.

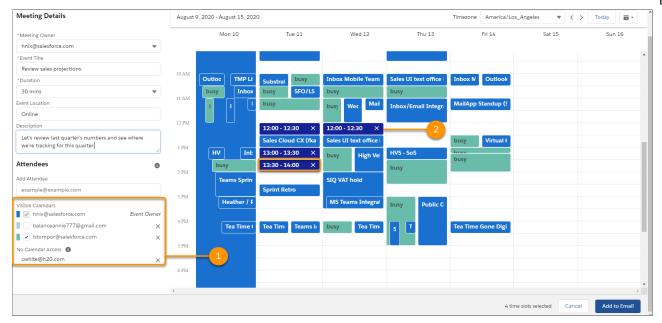
Where: This change applies to Lightning Experience orgs with Salesforce Inbox and Enhanced Email enabled in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Users with the Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license.

How: A rep who is setting up a meeting clicks the **Insert available times** icon at the bottom of the email composer.



The email sender's calendar appears, along with the calendars of any attendees who are sharing their calendar.



The rep selects whose calendar to view (1) and clicks time slots (2) to suggest for the event.

SEE ALSO:

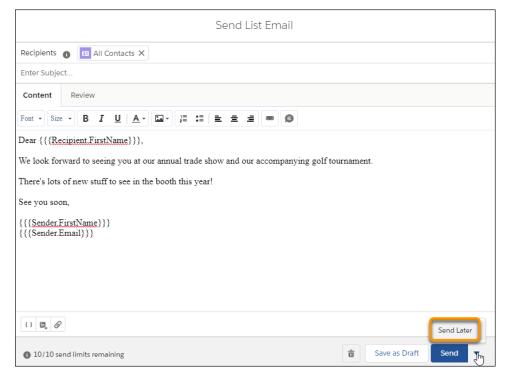
Salesforce Help: Considerations for Insert Availability in Lightning Experience (can be outdated or unavailable during release preview)

Send List Emails at the Ideal Time

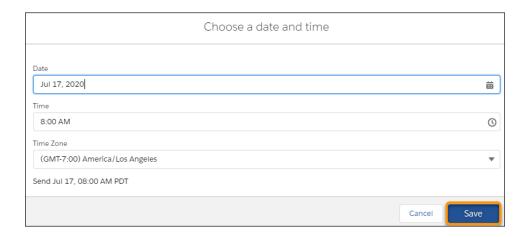
Reps can now schedule when to send a list email. Choose an ideal date and time to ensure that the list email has the best chance of being read. For example, schedule a list email to arrive at the beginning of the work day. Scheduling was previously available for individual emails only.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: To schedule a list email, select **Send Later**.



Set a date and time for the list email to be sent.

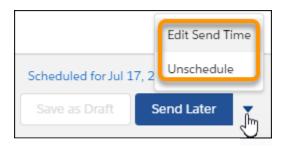


Click **Save** to save the date and time and return to the list email.



Click **Send Later** and the email is scheduled to be sent at that date and time.

To change the scheduled time or delete the email, click the Send Later dropdown.



Or, go to the List Emails home page.

SEE ALSO:

Salesforce Help: Send List Email in Lightning Experience (can be outdated or unavailable during release preview)
Salesforce Help: Schedule Emails with Send Later (can be outdated or unavailable during release preview)

Create Larger Emails with New Maximum Size of 35 MB

We increased the maximum size of outbound and inbound emails from 25 MB to 35 MB. The size of an email message includes the email headers, body, attachments, and encoding. Email size can also vary depending on character set.

Where: This change applies to Lightning Experience in the Personal, Contact Manager Group, Professional, Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Email and Email Template Allocations per Edition (can be outdated or unavailable during release preview)

Default Email Encoding Changing to UTF-8

For new Salesforce orgs, the default email encoding for templates, footers, and user email settings is changing to 8-bit Unicode Transformation Format (UTF-8). This update is to support Email Address Internationalization.

Where: This feature is found in the Email Encoding section.

Who: This change applies to any user in a new org created after the release. Existing org users still have the prior default settings, but they can update to UTF-8.

How: In Personal Settings > My Personal Info > Language & Timezone > Email Encoding, Unicode is the default setting. You can still select other default options.

SEE ALSO:

Default Email Encoding Changing to UTF-8

Salesforce Help: Edit Your Language and Locale Settings (can be outdated or unavailable during release preview)

Streamline Contacts and Leads with Default Bounce Alerts

When bounce processing is enabled, bounce alerts now appear for all Contacts and Leads with the same email address.

Where: This feature is found in the Admin section under Deliverability. This setting is a Salesforce org-level setting valid for all users within a specific org.

How: In the Deliverability section, **Show bounce alert next to all instances of the email address** is no longer an option. When an email is returned as invalid, the bounce alert is automatically displayed next to all instances of that email address in Contact and Lead records.

SEE ALSO:

Streamline Contacts and Leads with Default Bounce Alerts

Salesforce Help: Enable Email Bounce Handling(can be outdated or unavailable during release preview)

Email Templates: Email Template Builder

Quickly and easily create email templates with Email Template Builder's visual tools.

IN THIS SECTION:

Interactively Create Engaging Email Templates

Create email templates faster and more easily with visual tools in Email Template Builder. Instead of adding HTML code, your users can drag elements to create effective email templates. They can compose email templates with a few clicks to place design elements right where they want them.

Interactively Create Engaging Email Templates

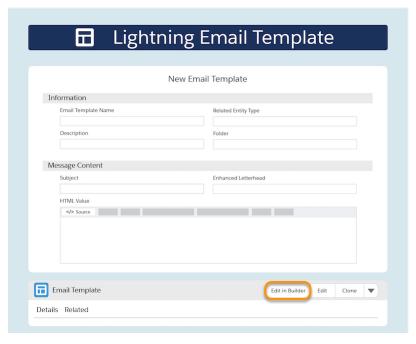
Create email templates faster and more easily with visual tools in Email Template Builder. Instead of adding HTML code, your users can drag elements to create effective email templates. They can compose email templates with a few clicks to place design elements right where they want them.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions, and all editions of Pardot in the Pardot Lightning app. This feature isn't available in Pardot Classic or the standalone Pardot app.

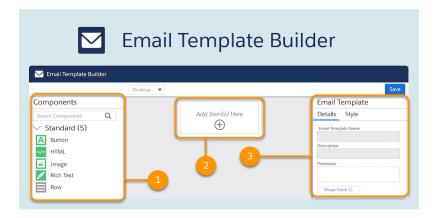
Who: Creating and managing Email Template Builder templates is available to users with the Access Drag-and-Drop Content Builder or Manage Content Builder permission. Any user that can send an email can use email template builder templates.

How: Sending professional, appealing emails is essential when communicating with your customers. Using captivating email templates gets you there.

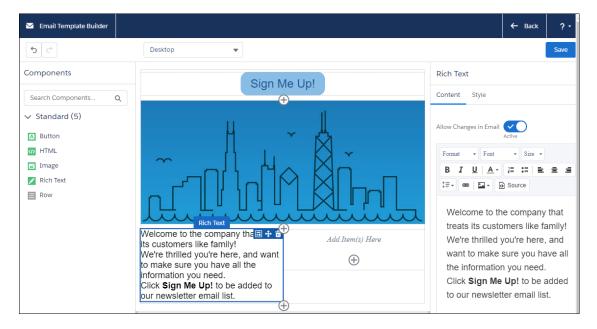
After creating a Lightning email template, users with the correct permission see the **Edit in Builder** button.



Click **Edit in Builder** to open Email Template Builder.



Choose a component (1) and drag it to the canvas (2). Change the details and style of the component using the properties panel (3).



Your users now can easily create an engaging email template.



Note: Email Template Builder isn't available for previously created Classic and Lightning email templates.

SEE ALSO:

Create Engaging Email Content with Ease

Salesforce Help: Email Template Builder (can be outdated or unavailable during release preview)

Salesforce Inbox Mobile: Smarter Selling from Your Inbox

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- Inbox Mobile for iOS
- Inbox Mobile for Android

To learn about the latest features and enhancements in Inbox desktop, see the Outlook Integration, Gmail Integration, and Email Experience sections of the Salesforce release notes.

SEE ALSO:

Outlook® Integration: Manual Email Logging with Einstein Activity Capture, Shared Mailbox Support, and Insert Availability Improvements

Gmail[™] Integration: Manual Email Logging with Einstein Activity Capture and Updated Insert Availability Email Experience: Use Insert Availability, Schedule List Emails, and Streamlined Bounce Alerts

WDC: A New Name

All instances of Work.com are now rebranded as WDC.

IN THIS SECTION:

Legacy Work.com Is Now WDC

All instances of Work.com are now rebranded as WDC. All the Work.com features are still there, but menu items and product headings now say WDC instead of Work.com.

Legacy Work.com Is Now WDC

All instances of Work.com are now rebranded as WDC. All the Work.com features are still there, but menu items and product headings now say WDC instead of Work.com.

Where: This change applies to Salesforce Classic in the Performance edition. WDC is available in Salesforce Classic as an add-on license for Professional, Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Promote Wellness and Productivity with Work.com (can be outdated or unavailable during release preview)

Integration with Google: Manual Email Logging with Einstein Activity Capture Enabled, Insert Availability Improvements, Changes to Lightning Sync Availability

Reps can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. We made improvements to the Insert Availability window in the Gmail integration with Inbox, including accessibility and localization. Lightning Sync isn't available for new Salesforce customers.

IN THIS SECTION:

Gmail[™] Integration: Manual Email Logging with Einstein Activity Capture and Updated Insert Availability

Reps who don't use Salesforce Inbox can manually log emails in the Gmail integration when Einstein Activity Capture has emails disabled. Plus, the Insert Availability window in the Gmail integration with Inbox has stylistic and accessibility updates.

Lightning Sync for Google: Not Available for New Salesforce Customers

Lightning Sync isn't available for new Salesforce customers. If you're exploring contact and event sync, we recommend Einstein Activity Capture. Einstein Activity Capture offers sync plus even more productivity-boosting features. Keep reading to learn more about the change in Lightning Sync availability and the latest feature enhancements available for Einstein Activity Capture. Current customers can continue using Lightning Sync.

Gmail[™] Integration: Manual Email Logging with Einstein Activity Capture and Updated Insert Availability

Reps who don't use Salesforce Inbox can manually log emails in the Gmail integration when Einstein Activity Capture has emails disabled. Plus, the Insert Availability window in the Gmail integration with Inbox has stylistic and accessibility updates.

IN THIS SECTION:

Manually Log Emails from the Gmail Integration When Einstein Activity Capture Is On

If your Einstein Activity Capture configuration has emails disabled, reps can now log emails manually from the Gmail integration. Previously, if emails were disabled in the configuration, users weren't shown an option to log emails.

Insert Availability Improvements in the Gmail Integration with Inbox

The Insert Availability window now has stylistic updates in the Gmail integration with Inbox. And, it's set up for accessibility and WCAG 2.0 compliance, localization, and internationalization. All the great features, such as defining meeting details, selecting attendees, and sending your available times to meet are still there. If you also compose emails from Lightning Experience, you can now use the feature there to coordinate meeting times with customers and prospects.

Email Tracking Location Information Removed from the Gmail Integration with Inbox

When using email tracking, information about where an email is was opened is no longer available as of August 2020.

SEE ALSO:

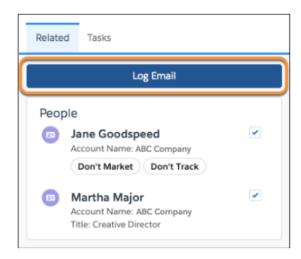
Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)

Manually Log Emails from the Gmail Integration When Einstein Activity Capture Is On

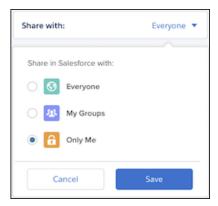
If your Einstein Activity Capture configuration has emails disabled, reps can now log emails manually from the Gmail integration. Previously, if emails were disabled in the configuration, users weren't shown an option to log emails.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: This change applies to users who have Einstein Activity Capture, but don't use Salesforce Inbox. When Einstein Activity Capture is enabled, users who are part of an Einstein Activity Capture configuration that doesn't include email capture see an option to log an email.



If a user is part of an Einstein Activity Capture configuration that has emails enabled, their emails are captured and logged to Salesforce automatically. These users see the sharing options available for their Einstein Activity Capture configuration.



SEE ALSO:

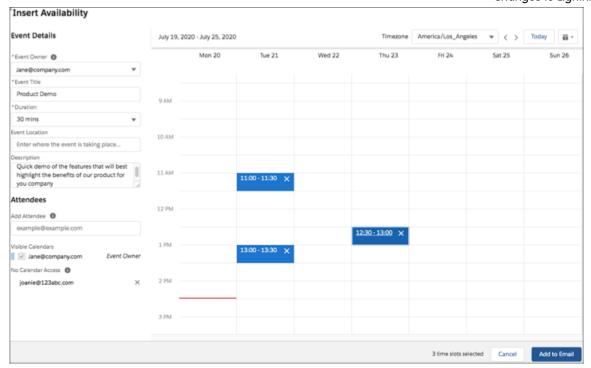
Salesforce Help: Select Who Can Use Einstein Activity Capture (can be outdated or unavailable during release preview)

Insert Availability Improvements in the Gmail Integration with Inbox

The Insert Availability window now has stylistic updates in the Gmail integration with Inbox. And, it's set up for accessibility and WCAG 2.0 compliance, localization, and internationalization. All the great features, such as defining meeting details, selecting attendees, and sending your available times to meet are still there. If you also compose emails from Lightning Experience, you can now use the feature there to coordinate meeting times with customers and prospects.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

How: There's no change to how you set up Insert Availability, and reps still access it using the Availability option when composing an email. It just looks a little different.



SEE ALSO:

Easily Coordinate When to Meet with Insert Availability in Lightning Experience

Salesforce Help: Considerations for Scheduling Meetings with Availability (can be outdated or unavailable during release preview)

Email Tracking Location Information Removed from the Gmail Integration with Inbox

When using email tracking, information about where an email is was opened is no longer available as of August 2020.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

Why: To comply with data protection and privacy regulations such as the California Consumer Privacy Act, this information is no longer gathered when using email tracking.

Lightning Sync for Google: Not Available for New Salesforce Customers

Lightning Sync isn't available for new Salesforce customers. If you're exploring contact and event sync, we recommend Einstein Activity Capture. Einstein Activity Capture offers sync plus even more productivity-boosting features. Keep reading to learn more about the change in Lightning Sync availability and the latest feature enhancements available for Einstein Activity Capture. Current customers can continue using Lightning Sync.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Lightning Sync isn't available for customers who purchase Salesforce after the Winter '21 release. After Winter '21, no Lightning Sync enhancements will be introduced. But customers who purchased Salesforce before Winter '21 can still access and enable Lightning Sync for users with the appropriate Salesforce licenses. And Lightning Sync continues to sync contacts and events for current users.

Why: We heard customer requests for more flexible connection options and optimized features. To offer you the best in Google integration, we're focusing our development efforts on one sync product: Einstein Activity Capture.

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for

With Einstein Activity Capture, sales reps get even more productivity features than they did with Lightning Sync. To read **Dottook Availability** benefits, see What Does Einstein Activity Capture Do?

And if you considered Einstein Activity Capture in the past, you're probably most interested in our Winter '21 improvements. For example, now you can choose to sync contacts and events from Salesforce to Google only. To learn more about what's offered in Winter '21, check out the Einstein Activity Capture release notes.

To learn more about the change in Lightning Sync availability, see Lightning Sync: Not Available for New Salesforce Customers Starting in Winter '21.

SEE ALSO:

Salesforce Help: Compare Einstein Activity Capture and Lightning Sync (can be outdated or unavailable during release preview)

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability

Sales reps can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. Sales reps can now log emails and events to Salesforce from Outlook Shared Folders and from Delegate Access Mailboxes. Lightning Sync isn't available for new Salesforce customers. Salesforce for Outlook retirement is delayed, and a phased retirement schedule is being introduced.

IN THIS SECTION:

Microsoft Teams Integration: Bring Salesforce and Microsoft Teams Together (Pilot)

Your sales and service teams use Salesforce to manage customer relationships. They also chat in Microsoft Teams and discuss topics relevant to their sales pipeline and service cases. The Teams Integration provides context about Salesforce records from Teams channels and one-on-one chat conversations, eliminating switching between applications. Salesforce users can mention Salesforce records in Teams to facilitate collaboration. They can preview details of records that others post, pin records to channel tabs for easy access, and keep records up to date with inline editing. Reps can also post important moments to Salesforce record Chatter feeds, all directly from Teams.

Outlook® Integration: Manual Email Logging with Einstein Activity Capture, Shared Mailbox Support, and Insert Availability Improvements

Reps who don't use Salesforce Inbox can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. Reps can also log emails and events from Outlook Shared Folders and Delegate Access Mailboxes. Plus, the Insert Availability window in the Outlook integration with Inbox has stylistic and accessibility updates.

Lightning Sync for Microsoft® Exchange: Availability Changes and Required Setup Adjustments

Lightning Sync isn't available for new Salesforce customers. Current customers on Microsoft Office 365° must review their settings and prepare for Basic Authentication retirement, scheduled for the second half of 2021.

Salesforce for Outlook: Retirement Rescheduled and Restoring Lost Access

Salesforce for Outlook retirement is delayed. Instead, we're introducing a phased retirement schedule. Keep reading to learn more. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to reconnect.

Microsoft Teams Integration: Bring Salesforce and Microsoft Teams Together (Pillot) vailability

Your sales and service teams use Salesforce to manage customer relationships. They also chat in Microsoft® Teams and discuss topics relevant to their sales pipeline and service cases. The Teams Integration provides context about Salesforce records from Teams channels and one-on-one chat conversations, eliminating switching between applications. Salesforce users can mention Salesforce records in Teams to facilitate collaboration. They can preview details of records that others post, pin records to channel tabs for easy access, and keep records up to date with inline editing. Reps can also post important moments to Salesforce record Chatter feeds, all directly from Teams.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



Note: We provide the Teams Integration to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for the Teams Integration in the Outlook/Teams, Gmail, and Inbox group in the Trailblazer Community.

Who: The Teams Integration is available to Salesforce orgs with either Sales or Service Cloud. When enabled, the integration features are available through the Salesforce app in desktop, mobile, and web versions Teams.

How: For information about joining the pilot, contact your Salesforce account executive.

SEE ALSO:

Salesforce Help: Microsoft Teams Integration (Pilot) (can be outdated or unavailable during release preview)

Outlook® Integration: Manual Email Logging with Einstein Activity Capture, Shared Mailbox Support, and Insert Availability Improvements

Reps who don't use Salesforce Inbox can manually log emails in the Outlook integration when Einstein Activity Capture has emails disabled. Reps can also log emails and events from Outlook Shared Folders and Delegate Access Mailboxes. Plus, the Insert Availability window in the Outlook integration with Inbox has stylistic and accessibility updates.

IN THIS SECTION:

Continued Support for the Outlook Integration in Older Versions of Outlook and Windows

We are continuing support for the Outlook integration in Outlook 2013, Outlook 2016, and volume-licensed versions of Outlook 2019 through the end of December 2021. Previously, we announced that Outlook integration users running these versions would lose access to the integration when support for Internet Explorer 11 in Lightning Experience ended in December 2020. This continued support applies only to the Outlook integration. It doesn't apply to Salesforce for Outlook or using Internet Explorer 11 to access Lightning Experience.

Manually Log Emails from the Outlook Integration When Einstein Activity Capture Is On

If your Einstein Activity Capture configuration has emails disabled, reps can now log emails manually from the Outlook integration. Previously, if emails were disabled in the configuration, users weren't shown an option to log emails.

Shared Folder Support in the Outlook Integration

Sales reps can now log emails and events to Salesforce from Outlook shared folders, which provide delegate access to an Outlook inbox and calendar. Reps can also create, view, and edit Salesforce records directly from the shared folder. If sales reps share a public email alias such as info@company123.com, they can now log communications from that address to Salesforce records.

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability

Insert Availability Improvements in the Outlook Integration with Inbox

The Insert Availability window now has stylistic updates in the Outlook integration with Inbox. And, it's set up for accessibility and WCAG 2.0 compliance, localization, and internationalization. All the great features, such as defining meeting details, selecting attendees, and sending your available times to meet are still there. If you also compose emails from Lightning Experience, you can now use the feature there to coordinate meeting times with customers and prospects.

Email Tracking Location Information Removed from the Outlook Integration with Inbox

When using email tracking, information about where an email is opened is no longer available as of August 2020.

SEE ALSO:

Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)

Continued Support for the Outlook Integration in Older Versions of Outlook and Windows

We are continuing support for the Outlook integration in Outlook 2013, Outlook 2016, and volume-licensed versions of Outlook 2019 through the end of December 2021. Previously, we announced that Outlook integration users running these versions would lose access to the integration when support for Internet Explorer 11 in Lightning Experience ended in December 2020. This continued support applies only to the Outlook integration. It doesn't apply to Salesforce for Outlook or using Internet Explorer 11 to access Lightning Experience.

Where: This change applies to the Outlook integration, formerly known as Lightning for Outlook, in all editions.

Who: This change applies to all users running the Outlook integration in older versions of Outlook, including Outlook 2013, Outlook 2016, or volume-licensed Outlook 2019.

Why: We heard you. Now isn't the best time to upgrade your systems to continue using the valuable features in the integration. To continue using the Outlook integration after the end of 2021, make plans now to upgrade. After December 2021 you need Office version 16.0.11629 and later, and Windows 10 versions 1903 and later.

To ensure that you have the latest Microsoft security and product updates, we always recommend running the latest versions of Outlook and Windows. Plus, the Outlook integration is built on the Microsoft Add-in Framework. Original versions of that framework use Internet Explorer 11 to launch the Salesforce add-in from desktop versions of Outlook. That requirement was true for all add-ins built on that framework, not just the Salesforce add-in. The latest versions of the Add-in Framework use Microsoft Edge to launch the add-in. Edge is the native browser available in newer versions of Windows. We continue to build the Outlook integration on the latest framework version to use the latest technology.

How: The Outlook integration runs as it has in previous releases, even on older versions of Outlook and Windows. But Lightning Experience support for Internet Explorer ends on December 31, 2020. Errors can then result if reps use older versions to launch Salesforce from the integration.

SEE ALSO:

Salesforce Help: Outlook Integration System Requirements (can be outdated or unavailable during release preview)

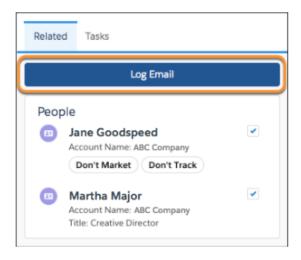
Manually Log Emails from the Outlook Integration When Einstein Activity Capture Is On

If your Einstein Activity Capture configuration has emails disabled, reps can now log emails manually from the Outlook integration. Previously, if emails were disabled in the configuration, users weren't shown an option to log emails.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: This change applies to users who have Einstein Activity Capture, but don't use Salesforce Inbox. When Einstein Activity Capture is enabled, users who are part of an Einstein Activity Capture configuration that doesn't include email capture see an option to log an email.

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability



If a user is part of an Einstein Activity Capture configuration that has emails enabled, their emails are captured and logged to Salesforce automatically. These users see the sharing options available for their Einstein Activity Capture configuration.



SEE ALSO:

Salesforce Help: Select Who Can Use Einstein Activity Capture (can be outdated or unavailable during release preview)

Shared Folder Support in the Outlook Integration

Sales reps can now log emails and events to Salesforce from Outlook shared folders, which provide delegate access to an Outlook inbox and calendar. Reps can also create, view, and edit Salesforce records directly from the shared folder. If sales reps share a public email alias such as info@company123.com, they can now log communications from that address to Salesforce records.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Shared folder support is available after all Salesforce production orgs receive the Winter '21 major release update. To get the major release upgrade date, go to Trust Status.

Who: Shared folder support is available to customers whose Salesforce orgs have Enhanced Email enabled and meet the following requirements:

- Exchange Online (build 15.20.3283.23 or later)
- Email client is one of the following:
 - Microsoft 365 (also called Office 365) subscription version 1910 (build 12130.20272) or later

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for

Office 2019 one-time purchase (retail) with a build version 1910 (build 12130.20272) or later

Outlook Availability

Outlook on the web

How: Reps access the integration from a shared folder, just like they do from their primary inbox or calendar. Because of the nature of a shared folder, some Salesforce Inbox productivity features, such as email tracking and insert availability, aren't fully supported. For example, email opens are only visible in the sending user's engagement feed. When inserting availability, only the current user's availability is shown, not the shared folder availability.

SEE ALSO:

Salesforce Help: Considerations for Outlook Shared Folders in the Outlook Integration (can be outdated or unavailable during release preview)

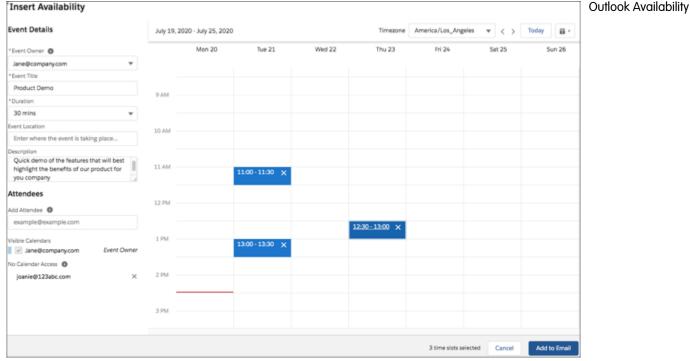
IdeaExchange: Use Outlook integration (Lightning for Outlook) with Corporate Shared Mailboxes

Insert Availability Improvements in the Outlook Integration with Inbox

The Insert Availability window now has stylistic updates in the Outlook integration with Inbox. And, it's set up for accessibility and WCAG 2.0 compliance, localization, and internationalization. All the great features, such as defining meeting details, selecting attendees, and sending your available times to meet are still there. If you also compose emails from Lightning Experience, you can now use the feature there to coordinate meeting times with customers and prospects.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

How: There's no change to how you set up Insert Availability, and reps still access it using the Availability option when composing an email. It just looks a little different.



SEE ALSO:

Easily Coordinate When to Meet with Insert Availability in Lightning Experience

Salesforce Help: Considerations for Scheduling Meetings with Availability (can be outdated or unavailable during release preview)

Email Tracking Location Information Removed from the Outlook Integration with Inbox

When using email tracking, information about where an email is opened is no longer available as of August 2020.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

Why: To comply with data protection and privacy regulations such as the California Consumer Privacy Act, this information is no longer gathered when using email tracking.

Lightning Sync for Microsoft® Exchange: Availability Changes and Required Setup Adjustments

Lightning Sync isn't available for new Salesforce customers. Current customers on Microsoft Office 365® must review their settings and prepare for Basic Authentication retirement, scheduled for the second half of 2021.

IN THIS SECTION:

Lightning Sync Not Available for New Salesforce Customers

If you're exploring contact and event sync for the first time, we recommend Einstein Activity Capture. Einstein Activity Capture offers sync plus even more productivity-boosting features. Keep reading to learn more about the change in Lightning Sync availability and the latest feature enhancements available for Einstein Activity Capture. Current customers can continue using Lightning Sync.

Integration with Microsoft[®]: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability

Required Setting Changes for Some Microsoft Office 365 Customers

Microsoft[®] has moved the Basic Authentication retirement for Microsoft Office 365[®] and Exchange Online to the second half of 2021. If you're an Office 365 customer using a service account as your connection method, contacts and events stop syncing at that time. To avoid a sync interruption, work with your Microsoft admin or IT professional to update your Lightning Sync connection method. Or consider moving to Einstein Activity Capture.

Lightning Sync Not Available for New Salesforce Customers

If you're exploring contact and event sync for the first time, we recommend Einstein Activity Capture. Einstein Activity Capture offers sync plus even more productivity-boosting features. Keep reading to learn more about the change in Lightning Sync availability and the latest feature enhancements available for Einstein Activity Capture. Current customers can continue using Lightning Sync.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Lightning Sync isn't available for customers who purchase Salesforce after the Winter '21 release. After Winter '21, no Lightning Sync enhancements will be introduced. But customers who purchased Salesforce before Winter '21 can still access and enable Lightning Sync for users with the appropriate Salesforce licenses. And Lightning Sync continues to sync contacts and events for current users.

Why: We heard customer requests for more flexible connection options and optimized features. To offer you the best in Microsoft integration, we're focusing our development efforts on one sync product: Einstein Activity Capture.

With Einstein Activity Capture, sales reps get even more productivity features than they did with Lightning Sync. To read about the benefits, see What Does Einstein Activity Capture Do?

And if you considered Einstein Activity Capture in the past, you're probably most interested in our Winter '21 improvements.

- Microsoft Office 365 users get new options for connecting to Salesforce: an org-level connection or a service account. Both connection methods provide the security of OAuth 2.0. Plus, users aren't required to connect their own accounts, which simplifies the rollout process.
- You can choose to sync contacts and events from Salesforce to Microsoft Exchange only.

To learn more about what's offered in Winter '21, check out the Einstein Activity Capture release notes.

To learn more about the change in Lightning Sync availability, see Lightning Sync: Not Available for New Salesforce Customers Starting in Winter '21.

SEE ALSO:

Salesforce Help: Compare Einstein Activity Capture and Lightning Sync (can be outdated or unavailable during release preview)

Required Setting Changes for Some Microsoft Office 365 Customers

Microsoft[®] has moved the Basic Authentication retirement for Microsoft Office 365[®] and Exchange Online to the second half of 2021. If you're an Office 365 customer using a service account as your connection method, contacts and events stop syncing at that time. To avoid a sync interruption, work with your Microsoft admin or IT professional to update your Lightning Sync connection method. Or consider moving to Einstein Activity Capture.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: This retirement affects these customers only:

- Current Lightning Sync users on Office 365 with Exchange Online who use a service account to connect to Salesforce.
- Current Salesforce customers who intend to set up Lightning Sync but whose Microsoft tenants were created after October 2020. For these customers, basic authentication isn't available, and an alternative authentication service is required to use Lightning Sync.

Integration with Microsoft®: Manual Email Logging with Einstein Activity Capture Enabled, Support for Shared Mailboxes, Changes to Lightning Sync and Salesforce for Outlook Availability

These customers aren't affected:

- Customers on Exchange 2016® or Exchange 2013® on-premise servers who connect to Salesforce using the service account connection method. Microsoft hasn't announced retirement for basic authentication for those servers.
- Customers on Office 365 who connect to Salesforce using the OAuth 2.0 connection method.

Why: Some Lightning Sync customers using the service account connection method are authenticating their Microsoft servers with Salesforce using Basic Authentication. When Basic Authentication is retired, contacts and events stop syncing for these customers.

How: To avoid a sync interruption, work with the Microsoft admin or IT professional at your company to verify whether the retirement impacts you. Then, review the available solutions and select the one that works best for you. See Adjust Your Sync Setup Before Basic Authentication Retirement.

SEE ALSO:

External Link: Basic Authentication and Exchange Online – April 2020 Update

Salesforce Help: Lightning Sync System Requirements (can be outdated or unavailable during release preview)

Salesforce for Outlook: Retirement Rescheduled and Restoring Lost Access

Salesforce for Outlook retirement is delayed. Instead, we're introducing a phased retirement schedule. Keep reading to learn more. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to reconnect.

IN THIS SECTION:

Salesforce for Outlook Retirement Rescheduled

To help you better prepare, Salesforce for Outlook retirement has been delayed, and we're introducing a phased retirement schedule. Keep reading for details. And if you already got a jump-start migrating to our next-generation products, Outlook Integration and Einstein Activity Capture, no need to slow your momentum. If you're ready, you can continue your migration as planned.

Restore Access If Service Is Interrupted

Changes in Microsoft® Internet Explorer® 11 (IE11) support that were introduced last year can interrupt service for Salesforce for Outlook users. See if your users are affected and how to restore access.

Find Version-Specific Salesforce for Outlook Release Notes

Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Gmail integrations and Inbox Trailblazer Community.

Salesforce for Outlook Retirement Rescheduled

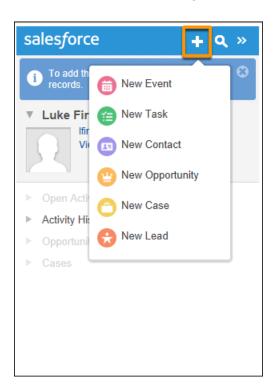
To help you better prepare, Salesforce for Outlook retirement has been delayed, and we're introducing a phased retirement schedule. Keep reading for details. And if you already got a jump-start migrating to our next-generation products, Outlook Integration and Einstein Activity Capture, no need to slow your momentum. If you're ready, you can continue your migration as planned.

Where: This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: The Salesforce for Outlook side panel action menu is being retired in June 2021. Salesforce for Outlook full product retirement is rescheduled for June 2023. Previously, retirement was scheduled for December 2020.

How: To delay retirement, we established some workarounds to the technical limitations facing Salesforce for Outlook as we neared the Internet Explorer 11 end of extended support. While we can delay retirement of most features until June 2023, some remaining dependencies can't be avoided. For this reason, the side panel action menu must be retired in June 2021.

After the action menu is retired, the new records button () will no longer be available in the side panel. And reps can no **longer exterior** Salesforce records from Outlook using Salesforce for Outlook.



Remaining Salesforce for Outlook features are available until the full product is retired in June 2023.

For more details on the action menu and full product retirement, see Salesforce for Outlook Retirement.

In the meantime, we continue to release new features for our next-generation Microsoft Integration products. Check out release notes for Outlook Integration and Einstein Activity Capture to learn what's new in Winter '21. If you're ready, we encourage you to make the move sooner rather than later. Get guidance on how to make the move in our migration guide, Move from Salesforce for Outlook to the Next-Generation Products

SEE ALSO:

Salesforce Help: Email Application Publisher Layouts

Supported Browsers for Lightning Experience

Knowledge Article: Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer 11

Restore Access If Service Is Interrupted

Changes in Microsoft® Internet Explorer® 11 (IE11) support that were introduced last year can interrupt service for Salesforce for Outlook users. See if your users are affected and how to restore access.

Where: This change applies to Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Starting last year in Winter '20, Salesforce for Outlook users can experience a service interruption when they meet either of these scenarios.

• Your Salesforce org or the user doesn't have access to Salesforce Classic.

• Your company has opted not to extend Microsoft Internet Explorer 11 support.

Why: In 2016, Salesforce stopped supporting Lightning Experience on IE11. Because Salesforce for Outlook relies on IE11 to display Salesforce from Microsoft Outlook®, the IE11 access block also affects Salesforce for Outlook users.

How: To restore Salesforce for Outlook access for users, take one of these suggested workarounds.

- Opt in to extended support for IE11.
- For customers whose Salesforce subscriptions offer access to Salesforce Classic, admins can also restore Salesforce for Outlook by providing users access to Salesforce Classic.

Or, consider moving to our next-generation products, Outlook Integration and Einstein Activity Capture.

For steps on restoring access and details on our next-generation products, see Salesforce for Outlook No Longer Connects for Some Customers Working from Lightning Experience.

SEE ALSO:

Supported Browsers for Lightning Experience

Salesforce Help: Outlook and Gmail Integration on Desktop (can be outdated or unavailable during release preview)

Salesforce Help: Einstein Activity Capture (can be outdated or unavailable during release preview)

Find Version-Specific Salesforce for Outlook Release Notes

Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Gmail integrations and Inbox Trailblazer Community.

Where: This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Trailblazer Community: Salesforce for Outlook Release Notes

Salesforce CPQ and Billing: Dynamic Quote Fields, Asset Lifecycle Management, and Standalone Orders

In Salesforce CPQ, you can control quote fields dynamically. Salesforce Billing customers can now get insight into what customers have bought, and create standalone orders.



Note: Salesforce CPQ and Salesforce Billing don't support New Order Save Behavior on page 208 in Salesforce Winter '21.

If you enable the New Order Save Behavior release update after installing CPQ or Billing, the packages may not work correctly. Also, they can't be upgraded until you disable the release update. To revert to previous behavior and allow upgrades, disable the release update.

IN THIS SECTION:

Salesforce CPQ: Dynamic Quote Fields, Orders Without Opportunities, and Amendment Improvements

Show relevant fields on quotes, depending on the business unit, product, or territory. Create orders without required opportunities. And sales reps can create add-ons on amendment quotes while avoiding backdated amendments with invalid start dates.

Salesforce Billing: Asset Lifecycle Management, Orders Without CPQ Quotes, Financial Transaction Reports, and Alignment for Canceled Billing Calculations

Reps can now get visibility into what customers have bought, using dashboards that show quantity, amount, and monthly recurring revenue throughout an asset's lifecycle. Create orders and order products without ordering them from a CPQ quote. Gather information about financial actions and store it for reporting and ERP integration. And align canceled billing calculations between Salesforce CPQ and Salesforce Billing.

SEE ALSO:

Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '21 (can be outdated or unavailable during release preview)

Salesforce CPQ: Dynamic Quote Fields, Orders Without Opportunities, and Amendment Improvements

Show relevant fields on quotes, depending on the business unit, product, or territory. Create orders without required opportunities. And sales reps can create add-ons on amendment quotes while avoiding backdated amendments with invalid start dates.



Note: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

Dynamically Control Quote Fields Shown in the Quote Line Editor

Tailor the quote fields that you show in the quote line editor dynamically so sales reps see only the fields that they need. You save sales reps time and avoid extraneous information by showing quote fields that are relevant to specific business units, products, or territories. Create a custom field to dynamically show or hide quote field sets, and use a picklist or formula to manage the field sets.

Create Orders Without Opportunities

Now it's easier to create CPQ orders if you don't need opportunities. When you order a CPQ quote, Salesforce CPQ no longer requires the quote to have a parent opportunity.

Sell Add-On Products on Amendments and Prevent Backdated Amendments at the Same Time

Your sales reps can now sell add-on products, and they're prevented from creating amendments with start dates before existing amendments' start dates. The backdated amendment restriction introduced in Spring '20 is updated to allow add-on products or subscriptions on amendment quotes. Previously, if a sales rep included a new product or subscription, the restriction blocked the amendment quotes from being saved.

Connect CPQ to B2B Commerce with Solution Kits

Cross-cloud solution kits help you tackle complex use cases that lead to customer dissatisfaction. Find out how to use the CPQ Connector to integrate B2B Commerce with CPQ billing and order information to improve the revenue management process.

Help Sales Reps Sell More with Product Recommendations in the Quote Line Editor

Help your sales reps sell more, and make quoting more efficient. Use the Salesforce CPQ Recommended Products Plugin with any recommendation engine to give your sales reps suggestions of complementary products related to the products on their quotes. A new button on the quote line editor takes sales reps to a product recommendations page where they can add recommended products to quotes.

Protect Your Data with Salesforce Shield

Use the Salesforce Shield security tools to comply with regulations on storing your sensitive information. With Shield Platform Encryption and Event Monitoring, you can monitor usage and add another layer of protection to data at rest, while preserving critical business functionality.

Validation Was Added to Ensure Unique Values for Number Field on Quote Lines

To ensure correct prices and other data, a new validation ensures that values for the Number field on quote lines are unique. The validation skips lines with a null value.

Permissions for Activating Order Products in Orgs with Usage-Based Pricing Were Changed

When the CPQ package setting Enable Usage Based Pricing is active, activating an order product now requires Read permissions on consumption schedules, consumption rates, order product consumption schedules, and order product consumption rates. Previously, these permissions were required only when activating an order product related to a product with a consumption schedule.

CPQ and Advanced Approvals Transition to Permission Set Licenses Is Complete

Salesforce CPQ and Advanced Approvals use permission set licenses instead of managed package licenses as of Winter '21.

SEE ALSO:

Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '21 (can be outdated or unavailable during release preview)

Dynamically Control Quote Fields Shown in the Quote Line Editor

Tailor the quote fields that you show in the quote line editor dynamically so sales reps see only the fields that they need. You save sales reps time and avoid extraneous information by showing quote fields that are relevant to specific business units, products, or territories. Create a custom field to dynamically show or hide quote field sets, and use a picklist or formula to manage the field sets.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Why: For example, Sales Team A sells subscription products, and Sales Team B sells one-time products. Using the custom field to dynamically control the quote field set, you can show quote fields on the quote line editor tailored to each sales team's product type. Sales Team A sees quote fields related to subscription products, such as start date, end date, and subscription term. Sales Team B sees the quote fields relevant to one-time products.

How: Create a custom field and enter a name. In the API name field, replace the auto-populated name with HeaderFieldSetName.

To give users control of the fields that are displayed, set the field type to **picklist**. Populate the options with the API names of field sets. Add the new custom field to your field set and save. The user's field set is displayed in the header section of the quote line editor. Make sure to add the custom field to all quote field sets.

To control the fields that are displayed with a formula, set the field type to **formula**. Create a formula to resolve to the API name of the field set. Use the API name for the field sets that include the quote fields that you want to show, and ensure that it returns a text string. Add the new custom field to your field set and save.

SEE ALSO:

Knowledge Article: Dynamically Display Salesforce CPQ Quote Fields in the Quote Line Editor

Knowledge Article: Salesforce CPQ Special Fields

IdeaExchange: Dynamic Quote Field Sets

IdeaExchange: Dynamically Display Quote Fields in the Quote Line Editor

Create Orders Without Opportunities

Now it's easier to create CPQ orders if you don't need opportunities. When you order a CPQ quote, Salesforce CPQ no longer requires the quote to have a parent opportunity.

Where: This change applies to Lightning Experience and Salesforce Classic for Salesforce CPQ+.

Why: Previously, Salesforce CPQ prevented you from ordering a CPQ quote without a parent opportunity. However, many CPQ use cases, such as eCommerce, self-service, and direct sales don't require opportunities. If your CPQ implementation handles one of these use cases, you're no longer required to create unnecessary opportunities.

How: In Salesforce CPQ Orders package settings, select Create Orders Without Opportunities.

Sell Add-On Products on Amendments and Prevent Backdated Amendments at the Same Time

Your sales reps can now sell add-on products, and they're prevented from creating amendments with start dates before existing amendments' start dates. The backdated amendment restriction introduced in Spring '20 is updated to allow add-on products or subscriptions on amendment quotes. Previously, if a sales rep included a new product or subscription, the restriction blocked the amendment quotes from being saved.

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce CPQ editions.

How: To access this update to the backdated amendment restriction, make sure to use the Winter '21 release.

SEE ALSO:

Salesforce Help: Guidelines for Amending Subscription Start Dates (can be outdated or unavailable during release preview)

Connect CPQ to B2B Commerce with Solution Kits

Cross-cloud solution kits help you tackle complex use cases that lead to customer dissatisfaction. Find out how to use the CPQ Connector to integrate B2B Commerce with CPQ billing and order information to improve the revenue management process.

IN THIS SECTION:

Synchronize Product and Pricing Data Solution Kit

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

Link Cart to Quote Solution Kit

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

Link Cart to Cash Solution Kit

Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.

Synchronize Product and Pricing Data Solution Kit

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

Who: Businesses who want to integrate Salesforce CPQ and B2B Commerce to sync data about products.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Link Cart to Quote Solution Kit

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

Who: Businesses who want to integrate Salesforce CPQ and B2B Commerce to link carts to quotes.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Link Cart to Cash Solution Kit

Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.

Who: Businesses who want to integrate Salesforce CPQ and B2B Commerce to link cart data to cash flow data.

Why: Simplify implementation by getting our recommendations for specific products, configurations, and best practices to resolve this issue.

How: Check out the complete solution kit in Salesforce Help or download it as a PDF. This solution kit is part of the Transform the Consumer Experience Customer 360 Guide.

Help Sales Reps Sell More with Product Recommendations in the Quote Line Editor

Help your sales reps sell more, and make quoting more efficient. Use the Salesforce CPQ Recommended Products Plugin with any recommendation engine to give your sales reps suggestions of complementary products related to the products on their quotes. A new button on the quote line editor takes sales reps to a product recommendations page where they can add recommended products to quotes.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

How: On the Plugins tab in the settings editor, select **Recommended Products Plugin**. To add the **Add Recommendations** button in the quote line editor, enable the Add Recommendations custom action button.

To fully enable the product recommendations feature, you must provide your own implementation of the plugin interface. You can create your own recommendation engine or utilize a third-party service.

SEE ALSO:

Recommended Products Plugin Guide (can be outdated or unavailable during release preview)

Salesforce Help: Custom Actions (can be outdated or unavailable during release preview)

Protect Your Data with Salesforce Shield

Use the Salesforce Shield security tools to comply with regulations on storing your sensitive information. With Shield Platform Encryption and Event Monitoring, you can monitor usage and add another layer of protection to data at rest, while preserving critical business functionality.

Who: This change is available to customers who purchased Salesforce Shield or Event Monitoring and Shield Platform Encryption add-on subscriptions.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

How: To set up Shield Platform Encryption, generate a tenant secret and specify which standard and custom fields to encrypt. To use Event Monitoring, use the SOAP or REST API to query the EventLogFile object, or simply download the Event Log File. Then, you can view the information with the visualization tool of your choice.

SEE ALSO:

Protect Your Data with Salesforce Shield

Validation Was Added to Ensure Unique Values for Number Field on Quote Lines

To ensure correct prices and other data, a new validation ensures that values for the Number field on quote lines are unique. The validation skips lines with a null value.

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce CPQ editions.

Why: The Number field (API name Number_c, on the SBQQ.QuoteLine object) determines the order of lines in a quote or quote line group. The field can be populated automatically or manipulated by custom code, automation, or other means. Previously, two or more quote lines could have the same Number value, resulting in inaccurate pricing or transposition of other data among lines.

Permissions for Activating Order Products in Orgs with Usage-Based Pricing Were Changed

When the CPQ package setting Enable Usage Based Pricing is active, activating an order product now requires Read permissions on consumption schedules, consumption rates, order product consumption schedules, and order product consumption rates. Previously, these permissions were required only when activating an order product related to a product with a consumption schedule.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce CPQ.

CPQ and Advanced Approvals Transition to Permission Set Licenses Is Complete

Salesforce CPQ and Advanced Approvals use permission set licenses instead of managed package licenses as of Winter '21.

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce CPQ editions.

SEE ALSO:

Knowledge Article: Salesforce CPQ Error 'As of Winter '21, Salesforce CPQ requires permission set licenses instead of managed package licenses. Contact your Salesforce CPQ admin about upgrading.'

Knowledge Article: Best Practices for CPQ Winter '21 Profiles and Permission Sets

Salesforce Billing: Asset Lifecycle Management, Orders Without CPQ Quotes, Financial Transaction Reports, and Alignment for Canceled Billing Calculations

Reps can now get visibility into what customers have bought, using dashboards that show quantity, amount, and monthly recurring revenue throughout an asset's lifecycle. Create orders and order products without ordering them from a CPQ quote. Gather information about financial actions and store it for reporting and ERP integration. And align canceled billing calculations between Salesforce CPQ and Salesforce Billing.



Note: You need Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

Understand What Your Customers Have Bought by Using Customer Asset Lifecycle Management

Use Customer Asset Lifecycle Management to provide visibility into products your customers have bought, from initial sale through the end date of a subscription or service. Account, sales, and service reps can now see an asset's quantity, amount, and monthly recurring revenue (MRR) at any point during an asset's lifecycle. They can also see related invoice lines, the source of a change, and other information. Your business consolidates purchases in one system, making subscriptions and other complex products easier to manage, and showing trends in a dashboard and reports. Developers or integrators automate creation of, changes to, and cancellation of lifecycle-managed assets using new objects and fields that enhance the Asset object.

Create Orders and Order Products Without CPQ Quotes

Manage your orders and order products in Salesforce and Salesforce Billing without first creating a CPQ quote. You can now create an order and its order products on your own or through API and then pass them to Salesforce Billing. We call this type of order a standalone order. They're useful if you manage your quotes and opportunities in an external platform but plan to use Salesforce Billing for order management and billing.

Gather Information About Financial Actions on Salesforce Billing Objects

Gather information about financial actions and store it for reporting and ERP integration. Finance transaction records help you track financial transactions based on actions taken in Salesforce Billing, allowing you to simplify your ERP integration. Finance balance snapshots help you track balance changes over time and report on historical balances or balances as of a certain date. Use Salesforce and Tableau reports to track important financial information and address aging or bad debt circumstances across all the records affected by a financial action.

Align Cancellation and Amendment Calculations Based on Billing Periods

We made it easier to align canceled billing calculations between Salesforce CPQ and Salesforce Billing.

Demonstrate Salesforce Billing Payment Functionality with Test Gateway Adapters

Now it's it easier to test Salesforce Billing payment features and demonstrate them with partners and potential customers. You can provide payment demonstrations with a test payment gateway adapter that doesn't require a connection to an established payment gateway.

Capture Externally Authorized Payments in Salesforce Billing

Capture externally processed payment authorizations and manage them in Salesforce Billing.

Billing Period Creation Logic Was Updated

We fixed an issue where Salesforce Billing calculated billing periods incorrectly. Previously, Salesforce Billing would create incorrect billing periods following a period where the final month did not contain the order product's billing day of month. The offset billing periods would cause unexpected invoice line balances for customers.

SEE ALSO:

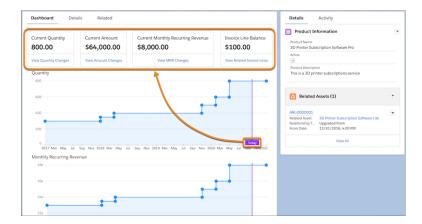
Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '21 (can be outdated or unavailable during release preview)

Understand What Your Customers Have Bought by Using Customer Asset Lifecycle Management

Use Customer Asset Lifecycle Management to provide visibility into products your customers have bought, from initial sale through the end date of a subscription or service. Account, sales, and service reps can now see an asset's quantity, amount, and monthly recurring revenue (MRR) at any point during an asset's lifecycle. They can also see related invoice lines, the source of a change, and other information. Your business consolidates purchases in one system, making subscriptions and other complex products easier to manage, and showing trends in a dashboard and reports. Developers or integrators automate creation of, changes to, and cancellation of lifecycle-managed assets using new objects and fields that enhance the Asset object.

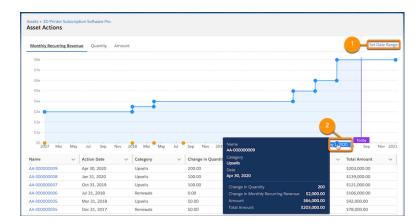
Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Salesforce Billing.

Why: The dashboard summarizes a customer's assets as of today's date—whether the assets are physical, subscription, or usage-based products, or professional or aftermarket services. It includes summary cards for quantity, amount, and monthly recurring revenue, plus invoice line balance. Charts show changes in quantity and MRR throughout the asset's lifecycle.



A background process that updates the dashboard and related pages runs nightly at 1:00 AM in the time zone of your org's server.

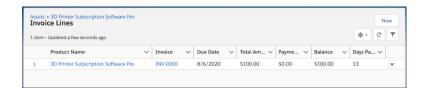
Using the **View Changes** dashboard links, reps can see charts and a related list showing details of changes from beginning to end of the asset's lifecycle. Reps can set the date range they want to see (1) and, in a chart, hover over a blue or orange dot for more details (2). With this visibility over time, reps can track trends: Is a customer renewing? Are they adding licenses as they grow?



A developer or integrator can include the following:

- The sources of an asset action—an order product or a work order line item, or an external reference. To see them, click the name of the asset action and then the Related tab.
- A business category for each change, such as initial sale or renewals. Reps can include these categories in reports to understand where revenue is rising or falling.

View Related Invoice Lines opens the invoice lines related list.



How: Enable the Allow access to Asset lifecycle management APIs permission for developers and Salesforce admins.

First, your developer integrates Customer Asset Lifecycle Management with sales or other channels, from Salesforce or third-party ecommerce, quoting, order management, or other applications. They use Connect REST API to automate creation of, changes to, and cancellation of lifecycle-managed assets. For details, see Customer Asset Lifecycle Management in New and Changed Connect REST API Resources.

Then, in Setup, you add two Lightning App Builder components to the Asset page: one for the dashboard, and one for each chart. Configure new lifecycle-managed objects and fields to support your business process, and give reps access to lifecycle-managed assets using field-level security.

SEE ALSO:

Salesforce Help: Understand What Your Customers Have Bought by Using Customer Asset Lifecycle Management (can be outdated or unavailable during release preview)

Create Orders and Order Products Without CPQ Quotes

Manage your orders and order products in Salesforce and Salesforce Billing without first creating a CPQ quote. You can now create an order and its order products on your own or through API and then pass them to Salesforce Billing. We call this type of order a standalone order. They're useful if you manage your quotes and opportunities in an external platform but plan to use Salesforce Billing for order management and billing.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

How: Orders and order products created in Salesforce CPQ have several field values inherited from parent products and quote lines. When you create an order without CPQ, you must provide these values on your own or through API. We introduced validations that ensure your standalone orders and order products are ready for invoicing and other Salesforce Billing features. Enable them by going to Salesforce Billing package settings and selecting the Enable Billing Order Validations setting.



SEE ALSO:

Salesforce Help: Set Up Standalone Orders (can be outdated or unavailable during release preview)

Gather Information About Financial Actions on Salesforce Billing Objects

Gather information about financial actions and store it for reporting and ERP integration. Finance transaction records help you track financial transactions based on actions taken in Salesforce Billing, allowing you to simplify your ERP integration. Finance balance snapshots help you track balance changes over time and report on historical balances or balances as of a certain date. Use Salesforce and Tableau reports to track important financial information and address aging or bad debt circumstances across all the records affected by a financial action

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

How: Create a finance transaction and populate it with information about the state of a record following a financial action in Salesforce Billing. For example, you could create a finance transaction when you post an invoice to a customer, then create another transaction when the customer pays an invoice. Each transaction records the financial data for the invoice posting and invoice payment respectively.

When you save a finance transaction related to an invoice, payment, refund, credit note, or debit note, Salesforce Billing creates a finance balance snapshot. The snapshot represents the balances of an invoice, payment, refund, credit note, or debit note over time following a financial action. You can review your finance balance snapshots to track the changes to your invoice balance over time.

We recommend running reports to view groups of finance balance snapshots filtered by values such as record ID, legal entity, and account. This process allows you to track the changes made to key financial entities over their lifecycle.



Note: Finance transactions and finance balance snapshots are Salesforce objects. However, they're available only to Salesforce Billing users.

SEE ALSO:

Salesforce Help: Finance Logging (can be outdated or unavailable during release preview)

Align Cancellation and Amendment Calculations Based on Billing Periods

We made it easier to align canceled billing calculations between Salesforce CPQ and Salesforce Billing.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

Why: Salesforce CPQ and Salesforce Billing use different formulas for calculating proration periods. Depending on your order product's billing fields, Salesforce Billing may split your order product's overall term into more or fewer proration periods than were used in CPQ. If you cancel an order product while CPQ and Billing have different numbers of proration periods, the canceled amount in Salesforce Billing may not be the same as the canceled amount in Salesforce CPQ.

We added the Proration Day of Month (Calendar Monthly + Daily) to the Subscription Prorate Precision package setting. We also added a Proration Day of Month field to the quote. While Proration Day of Month (Calendar Monthly + Daily) is active, Salesforce CPQ calculates proration periods based off the quote's proration day of month. If your quote's proration day of month matches the billing day of month on any resulting orders, CPQ and Billing will use the same proration periods for your order product.

How: If you want to align your CPQ and Billing proration periods so that your cancellation amounts are always the same, select Proration Day of Month (Calendar Monthly + Daily). Then, go to your quote and set its Proration Day of Month field to the same value as the billing day of month that you plan to use for the quote's orders.

SEE ALSO:

Salesforce Help: Align CPQ and Billing Cancellation Based on Billing Periods (can be outdated or unavailable during release preview)

Demonstrate Salesforce Billing Payment Functionality with Test Gateway Adapters

Now it's it easier to test Salesforce Billing payment features and demonstrate them with partners and potential customers. You can provide payment demonstrations with a test payment gateway adapter that doesn't require a connection to an established payment gateway.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

Why: Previously, demonstrating or testing Salesforce Billing payment features required a connection to a payment gateway. But gateway connections sometimes failed if you didn't have access to a fully implemented payment gateway adapter or if the demonstration was part of a sandbox org. You can now configure a test gateway adapter that passes payment information to a sample payment gateway built only for demonstrations and tests.

The test gateway sends a failure, success, or indeterminate response based on predefined input values so you can quickly demonstrate your integration's response processes. You can quickly test your integrations or provide demonstrations for customers without setting up connections.

How: We provide the test payment gateway adapter code as an open-sourced project and an unmanaged package. You can find more information and a walkthrough for configuring it in our Mock Adapter Reference Documentation.

Capture Externally Authorized Payments in Salesforce Billing

Capture externally processed payment authorizations and manage them in Salesforce Billing.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

Why: Previously, Salesforce Billing Payment API didn't support capturing payment authorizations from external systems. You can now record a payment authorization made in an external system and capture it in Salesforce Billing. You can then use Salesforce Billing to capture the payment later and manage the payment lifecycle.

How: First, synchronize your external authorization to the Payment Authorization object in Salesforce Billing. You can then use the CaptureTransaction API, which accepts a payment authorization record and the amount of a payment to capture as its input parameters. Following a successful transaction, Salesforce Billing creates a posted payment record. The payment record has a relation to the payment authorization record. The CaptureTransaction API also sends back a response with a success message.

If the transaction failed, the CaptureTransaction API sends back a response with an error message.

Billing Period Creation Logic Was Updated

We fixed an issue where Salesforce Billing calculated billing periods incorrectly. Previously, Salesforce Billing would create incorrect billing periods following a period where the final month did not contain the order product's billing day of month. The offset billing periods would cause unexpected invoice line balances for customers.

Where: This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

Why: Sometimes, a billing period falls in a month that doesn't contain the exact number of the Billing Day of Month or Override Billing Day of Month fields. In these cases, Salesforce Billing incorrectly places the order product's end date at the final day of the month. But this configuration prevents the next billing period from having a start date that's on or closest to the billing day of month.

For example, you have a monthly order product that runs from 01/25/20 through 06/24/20 with a Billing Day of Month set to 31. Let's look at the first five invoice lines that the order product generates.

Before Fix

- Period 1: 01/25/20 through 01/30/20
 - This partial period allows the next period to start on the billing day of month as expected.
- Period 2: 01/31 through 02/29
 - Salesforce Billing set the end date to 02/29 because February doesn't have a 31st date. But this configuration causes the next period to start on 03/01, rather than 02/29 as expected.
- Period 3: 03/01 through 03/30
- Period 4: 03/31 through 04/30
 - Salesforce Billing set the end date to 04/30 as April doesn't have a 31st date. But this configuration causes the next period to start on 05/01, rather than 04/30 as expected.
- Period 5: 05/01 through 05/30

In Salesforce Billing Winter '21 and later, the second and fourth billing periods instead end one day before the last day of the month. This configuration allows the third and fifth periods to start on their month's closest day to the billing day of month, as expected.

After Fix

- Period 1: 01/25/20 through 01/30/20
- Period 2: 01/31/20 through 02/28/20
- Period 3: 02/29/20 through 03/30/20
 - The 29th is the closest day in February to your billing day of month.

- Period 4: 03/31/20 through 04/29/20
- Period 5: 04/30/20 through 05/30/20
 - The 30th is the closest day in April to your billing day of month.

Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

IN THIS SECTION:

Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)

This update corrects an inconsistency when Salesforce Inbox email tracking is disabled, but tracking features are still available to users and tracking information is still collected.

Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)

This update corrects an inconsistency when Salesforce Inbox email tracking is disabled, but tracking features are still available to users and tracking information is still collected.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

When: Salesforce enforces this update in Winter '21 Patch 14. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: With this update, the Email Tracking setting on the Inbox Setup Assistant page correctly reflects whether the feature is enabled or disabled. When disabled, email tracking features aren't available to Inbox users and Salesforce doesn't collect any information about a recipient's engagement with an email.

How: If the Email Tracking setting is enabled, there's no change to your org. Reps are still able to use tracking features in Inbox. If the setting is disabled or you choose to set it to disabled, this update turns off the tracking features. Tracking information is no longer collected.

SEE ALSO:

Release Updates

Industries: Document Management, Forecasting, Public Service Optimization, and Much More

Our industry-specific solutions work even harder in Winter '21 to bring you closer to your customers. Health Cloud brings you streamlined document management for patient intake, along with new inventory management and sales forecasting capabilities. Financial Services Cloud unveils a new community portal template, compliant data sharing, and improved record rollups. Consumer Goods Cloud helps you plan store visits and keep shelves stocked, and Manufacturing Cloud gives you finer control over rebates and account forecasts. Our new data processing engine works behind the scenes to help you leverage your Salesforce data for bigger business impact. On top of all that, meet the newest addition to our lineup of industry-specific solutions: Public Sector Foundation, with advanced support for government service providers and users!

IN THIS SECTION:

Health Cloud: Intelligent Document Automation and Inventory Management

Patient intake can be a major pain point for efficient health care delivery. Our new document and referral management features make it easier to match patients with the programs and services they need. Intelligent Sales has also leveled up to help your sales reps do trailblazing work in the field with inventory management on the mobile app and product serialization.

Financial Services Cloud: New Community Portal Template, Compliant Data Sharing, Improved Record Rollups, and More Great New Stuff

Enrich customer experience with the new Financial Services portal. Use Compliant Data Sharing to improve your compliance with privacy regulations and company policies. Give users a consolidated view of all household cases by rolling up case records at the household level. Speed up batch record rollups with the new Record Rollup Configuration custom setting.

Public Sector Solutions: Licensing and Permitting Management Made Simpler, Faster, and Transparent (Generally Available)

Public Sector Solutions, built on the Salesforce platform, brings the benefits of digital transformation to governments and public agencies. Now you can build simpler, faster, and more transparent processes that delight your constituents and employees alike.

Consumer Goods Cloud: Direct Store Delivery, Visit Recommendations, and More

Ensure that sales reps visit the right stores at the right time with Einstein recommended visits. Use delivery tasks to keep your products in stock at stores. Help your sales managers and field reps stay agile with Consumer Goods objects now available on mobile.

Manufacturing Cloud: Rebates (Pilot) and Enhanced Account Forecasting

Run volume and revenue-based rebate programs with Rebate Management. Manage rebate programs and calculate payouts in context by working with your Salesforce data including orders and products. Run rebate calculations flexibly, build trust among partners, and analyze payout information at the end of term or anytime. Define sales agreement renewal period. Select sales agreements for account forecasting. Use probability and product schedules of opportunities to calculate the value of opportunity metrics in account forecasts.

Batch Management: Processing Large Volumes of Data with a Few Clicks (Pilot)

Process millions of records in your Salesforce org using Batch Management. Track the status and health of batch jobs using Monitor Workflow Services.

Data Processing Engine: Transform Data in Your Org in a Whole New Way (Pilot)

Extract data from standard objects and custom objects in your Salesforce org and transform it based on your business requirements. Then update or create records with the transformed data.

Emergency Response Management for Public Health

Emergency Response Management for Public Health has new compatibility requirements for your Salesforce orgs before they can process the push upgrade for the Winter '21 release.

Health Cloud: Intelligent Document Automation and Inventory Management

Patient intake can be a major pain point for efficient health care delivery. Our new document and referral management features make it easier to match patients with the programs and services they need. Intelligent Sales has also leveled up to help your sales reps do trailblazing work in the field with inventory management on the mobile app and product serialization.

IN THIS SECTION:

Winter '21 Upgrade Prerequisites

Health Cloud has new compatibility requirements for your Salesforce orgs before they can process the push upgrade for the Winter '21 release. For any future upgrades to be successful, you must enable data protection and privacy details for your records.

Intelligent Document Automation: Streamline Intake for Patient Services and Support

Reduce the time it takes to move a patient into the care they need. Jump directly from receiving a document to creating a patient record or enrolling the patient in a program, all in one easy-to-use interface.

Intelligent Sales: Field Inventory Management on Mobile, Product Serialization, and More

Intelligent Sales is even better now with added support for product serialization and field inventory management on your phone. Your reps can now manage their inventory on the go using the Intelligent Sales mobile app. They can also track products across visits and transfer requests using serial numbers.

Customize Healthcare Apps for Use Cases with Einstein Analytics for Healthcare Enhancements

The Einstein Analytics for Healthcare app now is customizable by use case. You can install only the dashboards for the data you use in your org and nothing extra.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

Health Cloud Has New App Builder Components

Create or customize your Health Cloud pages with these new components in the Lightning App Builder.

Winter '21 Upgrade Prerequisites

Health Cloud has new compatibility requirements for your Salesforce orgs before they can process the push upgrade for the Winter '21 release. For any future upgrades to be successful, you must enable data protection and privacy details for your records.

How:

- 1. From Setup, in the Quick Find box, enter Data Protection and Privacy, and then select Data Protection and Privacy.
- 2. Click Edit, select Make data protection details available in records, and then click Save.

Intelligent Document Automation: Streamline Intake for Patient Services and Support

Reduce the time it takes to move a patient into the care they need. Jump directly from receiving a document to creating a patient record or enrolling the patient in a program, all in one easy-to-use interface.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this feature, you must have the Health Cloud license provisioned in Salesforce.

- All users need the Health Cloud and Health Cloud Platform permission set licenses.
- The intake coordinator needs the View Setup and Configuration, Document Checklist, and Health Cloud Foundation permissions.
- Users need full access to the Document Checklist Item, Location, Received Document, and OCR Document Scan Result objects.

Why: Built on the Salesforce platform, intelligent document automation supports faster time-to-market with a robust feature set. Einstein-powered artificial intelligence enables you to develop your own unique scoring algorithms and use OCR technology. You can bundle offerings from our partner ecosystem, such as integration or eligibility checking. There's also a new standard report type you can use to track the progress of your documents.

IN THIS SECTION:

Process Intake Documents Better

Like it or not, there's a lot of paperwork involved in getting a patient into a care program. We can't reduce the number of documents you have to process, but we made it easier to work with them all in one place—no more juggling faxes, emails and paper.

Get a Handle on Referrals

Health Cloud offers a consolidated workspace for all your referral sources. Get higher provider and patient satisfaction by speeding up turnaround times for processing referrals, increasing conversion rates, and reducing errors.

Encrypt Data in Intake Documents

For increased security and compliance, consider using Platform Encryption to protect data extracted from incoming documents as part of the health care intake process.

Process Intake Documents Better

Like it or not, there's a lot of paperwork involved in getting a patient into a care program. We can't reduce the number of documents you have to process, but we made it easier to work with them all in one place—no more juggling faxes, emails and paper.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this feature, you must have the Health Cloud license provisioned in Salesforce.

Why: When an intake coordinator brings a patient into a home health service or a case manager enrolls a patient in a program, routing the necessary documents and faxes through a third-party system can result in a disjointed experience. All those manual steps can increase the chance of mistakes and delays. Now all that information is integrated into pre-configured document checklists so workers can efficiently and accurately put it to work for patients.

Get a Handle on Referrals

Health Cloud offers a consolidated workspace for all your referral sources. Get higher provider and patient satisfaction by speeding up turnaround times for processing referrals, increasing conversion rates, and reducing errors.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

Why: Easier routing of faxes and digital documents allows you to aggregate data and build more value into your referring provider relationships.

Encrypt Data in Intake Documents

For increased security and compliance, consider using Platform Encryption to protect data extracted from incoming documents as part of the health care intake process.

Who: Administrators with the Health Cloud Platform and the Shield Platform Encryption permission set licenses can encrypt fields in Health Cloud fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why:

The OCR Document Scan Result object contains patient information, such as diagnoses or prescriptions, extracted from documents used in the patient intake process. The ExtractedValues field in this object is encryptable.

The field has the type StringPlusClob with max length 131072.

SEE ALSO:

Protect Your Health Data with Salesforce Shield

Intelligent Sales: Field Inventory Management on Mobile, Product Serialization, and More

Intelligent Sales is even better now with added support for product serialization and field inventory management on your phone. Your reps can now manage their inventory on the go using the Intelligent Sales mobile app. They can also track products across visits and transfer requests using serial numbers.

IN THIS SECTION:

Manage Your Inventory on the Go

Reps can now manage their field inventory using the Intelligent Sales mobile app instead of lugging around a laptop. In addition to visit schedules, reps have access to visit creation, transfer requests, and product shortfall projections, all from the convenience of their phones.

Track Products Using Serial Numbers

Your reps are accountable for the products they handle. If your products are serialized, reps can now use those serial numbers in product transfers and order authorizations.

Track Serial Numbers in Orders Authorized in a Visit

We updated the Order Authorization flow to support serialized products. A barcode scanner is built into the flow to make it easier for your reps to record serial numbers in orders authorized in a visit.

Stay On Top of Transfer Requests with Chatter Post Notifications

Transfer requests have fewer chances of going unseen now, with automated Chatter notifications that are posted when a request is raised or updated. When a rep raises a transfer request, the rep who receives the request gets a Chatter post notifying them of the request and its details. Similarly, when a rep updates a request as accepted, rejected, or received, the other rep gets a Chatter post notifying them with the details.

Other Changes in Intelligent Sales

We made some more changes to Intelligent Sales that improve usability.

Manage Your Inventory on the Go

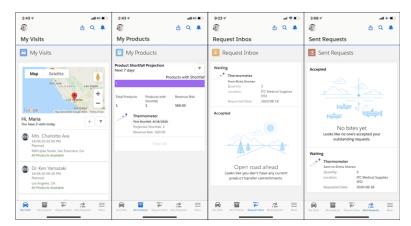
Reps can now manage their field inventory using the Intelligent Sales mobile app instead of lugging around a laptop. In addition to visit schedules, reps have access to visit creation, transfer requests, and product shortfall projections, all from the convenience of their phones.

Where: These changes apply to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

Why: We have four pages in the mobile app that help reps manage their inventory efficiently.

- My Visits: See visit appointments and shortfall status for the selected time period. Schedule visits on the go.
- My Products: Get detailed information about visit-based shortfall projections and the associated revenue risk. Request product transfers as necessary.
- Request Inbox: View and act on the transfer requests received.
- Sent Requests: View the status of transfer requests sent, and mark products as received after a transfer request is completed.



How: Enable the Intelligent Sales and Visit Inventory Management org prefs.

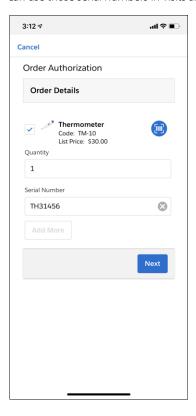
Track Products Using Serial Numbers

Your reps are accountable for the products they handle. If your products are serialized, reps can now use those serial numbers in product transfers and order authorizations.

Where: These changes apply to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

Why: Associating serial numbers with products helps you track product movement across transfers and surgical visits. A bar code scanner in the mobile app lets your reps quickly scan products in. Add serial numbers to products using the desktop app, and then your reps can use those serial numbers in visits and transfers on the mobile app.



How: Enable the Intelligent Sales and Visit Inventory Management org prefs.



Note:

- To use the barcode scanner, the mobile device used must have a camera. The desktop app doesn't support the barcode scanner
- In barcode scanning, the Android app uses the Zebra Crossing library. The iOS app uses Apple's built-in libraries, except for AVMetadataObjectTypeFace. For details, see AVMetadataObjectType.

SEE ALSO:

Supported Barcodes

Track Serial Numbers in Orders Authorized in a Visit

We updated the Order Authorization flow to support serialized products. A barcode scanner is built into the flow to make it easier for your reps to record serial numbers in orders authorized in a visit.

Where: These changes apply to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

How: Add the Order Authorization flow to the action plan template you set up for visits.

Stay On Top of Transfer Requests with Chatter Post Notifications

Transfer requests have fewer chances of going unseen now, with automated Chatter notifications that are posted when a request is raised or updated. When a rep raises a transfer request, the rep who receives the request gets a Chatter post notifying them of the request and its details. Similarly, when a rep updates a request as accepted, rejected, or received, the other rep gets a Chatter post notifying them with the details.

Where: These changes apply to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

How: Enable the Intelligent Sales and Visit Inventory Management org prefs.

Other Changes in Intelligent Sales

We made some more changes to Intelligent Sales that improve usability.

- Visit Schedule is renamed to My Visits in the mobile app.
- Four global shortcuts at the bottom of the screen in the mobile app get you to the My Visits, My Products, Request Inbox, and Sent Requests pages from anywhere in the Intelligent Sales app.
- Set the filter to Today and the My Visits page shows a map with visit locations in the mobile app.
- The Recalculate option is removed from the Products tab in the Visits page and the Inventory tab in the Products page. The inventory numbers are now refreshed every time an inventory-affecting event occurs.
- The Product Availability Projection and My Visits components now let you filter visits and shortfalls up to 90 days.
- You can't mark a transfer request as received from the product transfer record anymore. Mark a request as received from the Sent Requests page of the Intelligent Sales mobile app to automatically update the product transfer record.

Customize Healthcare Apps for Use Cases with Einstein Analytics for Healthcare Enhancements

The Einstein Analytics for Healthcare app now is customizable by use case. You can install only the dashboards for the data you use in your org and nothing extra.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled. Analytics for Healthcare is only for Salesforce Health Cloud users.

Who: To create an app from the Einstein Analytics for Healthcare template, you must also have the Healthcare Analytics Plus add-on license.

Why: Customize the data you want to see in your Analytics for Healthcare template by choosing to install the Care Plans, Care Requests, Referrals, Patients, and Surgical Visits use cases. If you aren't using one or more of these use cases in your Salesforce org, you can leave it out to get a clear view of the data you want to see. Enhancements to the Referrals dashboards let you choose between days and hours while filtering open referrals.

How: In Analytics Studio, click **Create** and choose **App**. Find and select **Analytics for Healthcare**. Then follow the instructions in the wizard to create your app. Use the **Custom** selection in the wizard to customize the use cases in your app.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

Health Cloud

Group related code sets

Use the new CodeSetBundle object.

Store detailed information about a person's name

Use the new PersonName object.

Specify the rank of preference for a person's contact number

Use the new PreferenceRank field on the ContactPointPhone object.

Specify type of use for a person's contact number

Use the new UsageType field on the ContactPointPhone object.

Intelligent Document Management

Rotate, split, and extract text from user-supplied documents.

Use the new ReceivedDocument object.

Associate a user-supplied document with a document checklist item.

Use the new ReceivedDocument lookup field on the DocumentChecklistItem object.

Intelligent Sales

Mark products as ready for serialization

Use the new IsSerialized field on the Product 2 object.

Specify the dates your reps need product transfers to happen

Use the NeedByDate field on the ProductRequest object.

Connect a product request record to a product transfer record

Use the ProductRequestLineItemNumber, NeedByDate, ParentId, Product2Id, and QuantityRequested fields on the ProductRequestLineItem object.

Associate Serial Numbers to Products

Use the new SerializedProduct object.

Patient Referrals

Health Cloud has added custom fields to the standard Lead object to support patient referrals.

Forecast a patient's discharge date

Use the new AnticipatedDischargeDate field on the Lead object.

Record a patient's actual discharge date

Use the new DischargeDate field on the Lead object.

Store emergency contact information for a patient

 $Use the {\tt new EmergencyContactFirstName, EmergencyContactLastName, and EmergencyContactPhone} fields on the Lead object.$

Specify an emergency contact's connection to the patient

Use the new EmergencyContactRelationship field on the Lead object.

Record the date of an in-person interaction with a patient

Use the new FacetoFaceEncounterDate field on the Lead object.

Store a patient's gender

Use the new Gender field on the Lead object.

Specify whether a patient can leave home

Use the new Homebound field on the Lead object.

Specify a patient's primary spoken language

Use the new Language field on the Lead object.

Record a patient's primary care provider

Use the new PrimaryCareProvider field on the Lead object.

Record a patient's diagnosis

Use the new PrimaryDiagnosisDescription field on the Lead object.

Record why a patient is not qualified for referral

Use the new ReasonforDisqualification field on the Lead object.

Record the date a patient was admitted

Use the new ReferrerAdmitDate field on the Lead object.

Store information about the provider that referred a patient

Use the new ReferringContactName and ReferringContactPhone fields on the Lead object.

Store the National Provider Identifier number of the provider that referred a patient

Use the new ReferringNPI field on the Lead object.

Store a secondary diagnosis for a referred patient

Use the new Secondary Diagnosis Description field on the Lead object.

Specify a patient's seconday insurance provider

Use the new Secondary Insurance field on the Lead object.

Great New Stuff

Store a patient's secondary insurance ID

Use the new SecondaryInsuranceID field on the Lead object.

Record the provider that signed the referral request

Use the new SigningProvider field on the Lead object.

Store a patient's Social Security number

Use the new SSN field on the Lead object.

Record the date that care started

Use the new Start/ResumptionofCareDate field on the Lead object.

Health Cloud Has New App Builder Components

Create or customize your Health Cloud pages with these new components in the Lightning App Builder.

Intelligent Sales Mobile App

View open cases and open orders on the account your rep is visiting

Use the new Visit Account Info - Health Cloud component. You can add this component to Visit record pages for mobile.

View products added to a visit

Use the new Visit Products - Health Cloud component. You can add this component to Visit record pages for mobile.

Financial Services Cloud: New Community Portal Template, Compliant Data Sharing, Improved Record Rollups, and More Great New Stuff

Enrich customer experience with the new Financial Services portal. Use Compliant Data Sharing to improve your compliance with privacy regulations and company policies. Give users a consolidated view of all household cases by rolling up case records at the household level. Speed up batch record rollups with the new Record Rollup Configuration custom setting.

IN THIS SECTION:

Mortgage for Financial Services Cloud: Enhanced Customer Experience with Pre-Built Community and New Flow

Configure and brand a self-service Financial Services Client Portal to reduce call center traffic by letting borrowers apply for their loans. Use a streamlined API from a single URL to create or update a loan application in Salesforce or from an external loan origination system. The Mortgage Business API can also upsert Account and Opportunity records, which previously required separate API calls.

Insurance for Financial Services Cloud: Consolidated View of Household Policies, Record Type Filter on Policies, and Support for Account Relationships

Add the enhanced Policy component to the Household page to give agents an at-a-glance view of all policies in a household. New options on the Policy component give you greater control over the information you want to display on the component. And now we support account relationships on key Insurance objects to let you easily manage external users' access to Insurance records.

Wealth Management for Financial Services Cloud: New Prediction Capabilities

Use the new Predict apps in Einstein Analytics to increase your Wealth Management capabilities. Powered by Einstein Discovery stories, the new Predict apps create predictions on the churn of your client accounts and the likelihood to grow your account assets.

Compliant Data Sharing: Advanced Data Sharing Configuration to Improve Compliance (GA)

Improve compliance with data sharing regulations and company policies by using the new Compliant Data Sharing (CDS) feature. Control what information gets shared with whom, without writing complex code.

Actionable Relationship Center: Manage Complex Relationships and Related Lists

Create and edit account and contact relationships and other related records in one convenient interface using Actionable Relationship Center (ARC). ARC displays complex relationships and related lists at-a-glance. Now you can create and edit relationships and related records from the same interface. ARC now does nearly everything the Relationship Map component can do, and displays related lists also.

Stay Productive with Financial Services Cloud Lightning Components for Mobile

Boost remote user productivity by including Financial Services Cloud Lightning Components in the Salesforce mobile app.

Record Rollups for Financial Services Cloud

Improve record rollup performance with these enhancements.

Speed up Interaction Date Calculations

See Next and Last Interaction Date fields update faster than before. Activate the new Use Standard Triggers metadata types for Tasks and Events to speed up interaction date calculations for those objects.

Encrypt Identity Document Fields

You can now encrypt fields on the documents you use to identify Financial Services Cloud clients. When you encrypt the Document Number, Issue Date, and Expiration Date fields, you add another layer of protection to the data your clients entrust to your care.

New and Changed Financial Services Cloud Object Fields

Do more with the new and updated Financial Services Cloud objects.

New and Changed Financial Services Cloud Metadata Types

Do more with the new and changed metadata types.

REST API

Financial Services Cloud REST API includes enhanced calls.

Mortgage for Financial Services Cloud: Enhanced Customer Experience with Pre-Built Community and New Flow

Configure and brand a self-service Financial Services Client Portal to reduce call center traffic by letting borrowers apply for their loans. Use a streamlined API from a single URL to create or update a loan application in Salesforce or from an external loan origination system. The Mortgage Business API can also upsert Account and Opportunity records, which previously required separate API calls.

IN THIS SECTION:

Use a Financial Services Community to Speed Loan Processing and Empower Loan Officers

Let customers manage their own mortgage applications and financial accounts using a prebuilt Financial Services Client Portal community. Borrowers can apply for loans, upload documents, monitor application status, and view frequently asked questions. To request help with applications or loans, your customers can log a case, which is seamlessly integrated with Salesforce case management and Chatter.

New Financial Services Cloud Flow and Flow Screen Components

The new Create a Case standard flow template lets customers create a customer service case based on a financial account, loan, or other circumstance. New Flow Screen Components, Button Picklist from Account ID and Section Summary View, give you more options for displaying and gathering information in screen flows.

Use New Summary View Lightning App Builder Component

Add a financial services or loan application summary to page layouts in Lightning App Builder. Use the Summary View component, which contains records that correspond to sections of the Universal Residential Loan Application, on Residential Loan Application page layouts.

Get Notifications of Changes to Mortgage Object Records

With Change Data Capture, you can now receive notifications of record changes in Mortgage objects.

Create or Update Loan Applications and Upsert Records from a Single Endpoint

The new and enhanced mortgage API streamlines APIs from the prior release. With it you can create or update a Salesforce or externally sourced loan application from the same URL. An Upsert endpoint lets you patch inputs to create Account and Opportunity records in Salesforce.

Create a Loan Forbearance Solution

Get a handle on the high volume of requests for loan modifications occasioned by the COVID-19 pandemic economy. Salesforce Cross-Cloud tools provide digital channels to address borrower needs responsively while reducing traffic to call centers and adding visibility to the process.

Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App

Analytics for Mortgage equips loan officers and managers to drive increased mortgage sales as it helps prioritize the customer leads and mortgage applications to focus on.

Use a Financial Services Community to Speed Loan Processing and Empower Loan Officers

Let customers manage their own mortgage applications and financial accounts using a prebuilt Financial Services Client Portal community. Borrowers can apply for loans, upload documents, monitor application status, and view frequently asked questions. To request help with applications or loans, your customers can log a case, which is seamlessly integrated with Salesforce case management and Chatter.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: The cloud-based community adds value for everyone. Borrowers can quickly apply for loans, upload required documents, and browse knowledge base articles. Loan officers can speed processing and work with stakeholders to pass title, insurance, and other milestones. The community has support for self-serve case creation and management, including forbearance requests.

How: Build out and brand a self-service Financial Services Client Portal with a new community template. Then customize the client journey with the mortgage flow screen components.

IN THIS SECTION:

Configure a Self-Service Community with the New Financial Services Client Portal

Offer a self-guided loan application and financial account experience for your customers by configuring the Financial Services Client Portal. Enable prebuilt components to start a loan application, browse knowledge base articles, display application summaries, and launch a self-service flow to request help.

Customize Your Community with New Financial Services Components

Three new flow screen components add power and flexibility to your screen flow interactions with users and are available in Experience Builder.

Configure a Self-Service Community with the New Financial Services Client Portal

Offer a self-guided loan application and financial account experience for your customers by configuring the Financial Services Client Portal. Enable prebuilt components to start a loan application, browse knowledge base articles, display application summaries, and launch a self-service flow to request help.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Customize Your Community with New Financial Services Components

Three new flow screen components add power and flexibility to your screen flow interactions with users and are available in Experience Builder.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Create flow screens that show data in the most effective way to reach your financial services customers:

- Open Loan Application shows the most recently updated, non-closed loan application for the user.
- Mortgage Flow Launcher lets community users launch the financial services cloud flows.
- Summary View shows summary sections for selected mortgage objects based on the Unified Residential Loan Application (URLA).

How: Add a component to your community in Experience Builder.

New Financial Services Cloud Flow and Flow Screen Components

The new Create a Case standard flow template lets customers create a customer service case based on a financial account, loan, or other circumstance. New Flow Screen Components, Button Picklist from Account ID and Section Summary View, give you more options for displaying and gathering information in screen flows.

IN THIS SECTION:

Add a Self-Service Help Standard Flow Template

Let customers create a customer service case and upload supporting documents using the new Create a Case standard flow template.

Use New Flow Screen Elements for Financial Services Communities

Use new flow screen components to build or enhance self-guided customer communities.

Add a Self-Service Help Standard Flow Template

Let customers create a customer service case and upload supporting documents using the new Create a Case standard flow template.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Empower customers to request help via an integrated digital channel that automatically attaches relevant account records and any uploaded support documents, reducing call traffic to your troublesbhooting desk.

How: To create a custom flow, clone an existing standard flow. You can also select the Mortgage flow type and then select a standard flow as the template. Build, test, and activate your custom flow, and then expose it on the community portal using a guided action or the Mortgage Flow Launcher.

Use New Flow Screen Elements for Financial Services Communities

Use new flow screen components to build or enhance self-guided customer communities.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: New options to create flow screens that display data in the most effective way to all users:

- **Button Picklist from Account Id** displays relevant information about all residential loan application and financial account records associated with the account ID of the logged in user in a button picklist.
- **Section Summary View** displays summary sections for selected mortgage objects based on the Unified Residential Loan Application (URLA).

How: Add a flow screen component to a screen element in flows.

Use New Summary View Lightning App Builder Component

Add a financial services or loan application summary to page layouts in Lightning App Builder. Use the Summary View component, which contains records that correspond to sections of the Universal Residential Loan Application, on Residential Loan Application page layouts.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Use the new Summary View component, available in Lighting App Builder, to add useful information to a residential loan application page. You can render the information in read-only or view-edit mode.

How: Edit a residential loan application record page in Lighting App Builder. Drag the Summary View from the component list, then edit it and set the mode to read-only or view-edit.

Get Notifications of Changes to Mortgage Object Records

With Change Data Capture, you can now receive notifications of record changes in Mortgage objects.

Where: This change applies to Lightning Experience and Enterprise and Unlimited editions where Financial Services Cloud is enabled.

Why: Prompt notification of changes to mortgage records can help speed approval of loan applications. Change Data Capture publishes change events, which represent changes to Salesforce records. Changes include creation of a new record, updates to an existing record, deletion of a record, and undeletion of a record.

Create or Update Loan Applications and Upsert Records from a Single Endpoint

The new and enhanced mortgage API streamlines APIs from the prior release. With it you can create or update a Salesforce or externally sourced loan application from the same URL. An Upsert endpoint lets you patch inputs to create Account and Opportunity records in Salesforce

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Create a Loan Forbearance Solution

Get a handle on the high volume of requests for loan modifications occasioned by the COVID-19 pandemic economy. Salesforce Cross-Cloud tools provide digital channels to address borrower needs responsively while reducing traffic to call centers and adding visibility to the process.

Who: Lending institutions with residential loan portfolios.

Why: The Loan Forbearance solution is a guide to configuring cross-cloud Salesforce products to work together. The key components are Marketing Cloud, Community Portal, Einstein Bots, and Service Cloud. Salesforce administrators also build dashboards to track and analyze the solution.

How: Check out the complete Loan Forbearance Solution Kit.

Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App

Analytics for Mortgage equips loan officers and managers to drive increased mortgage sales as it helps prioritize the customer leads and mortgage applications to focus on.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Analytics for Mortgage app is only for Salesforce Financial Services Cloud users. To create an app from the Analytics for Mortgage template, you must also have the FSC Analytics Plus add-on license.

Why: Lending operations have been front and center in the banking industry's response to unprecedented times. Banks are now racing to digitize and connect processes to handle everything from a surge in mortgage refinancing inquiries to a deluge of loan forbearance requests. Here are some Analytics for Mortgage app features highlights:

Loan application overview

- Measure and monitor your loan application volume, loan amounts, and loan application completion rate to quickly identify bottlenecks concerning opportunities, missing documents, and financial accounts.
- Monitor and forecast your loan application volume vs completion rate.
- Slice and dice your loan applications by loan purpose and type, and prioritize your applications.

Team performance

• For managers, get visibility into who is processing loans faster, who has the highest volume loans, and who has more pending applications.

Meet mortgage sales quotas by prioritizing loan applications

- Analyze your loan applications to quickly process them though the loan pipeline.
- Drive customer satisfaction by prioritizing applications.

Lead conversion

Identify and process leads quickly to accelerate loan origination process.

How: In Analytics Studio, click **Create** and select **App**. Find and select **Analytics for Mortgage**. Then follow the instructions in the wizard to create your app.

Insurance for Financial Services Cloud: Consolidated View of Household Policies, Record Type Filter on Policies, and Support for Account Relationships

Add the enhanced Policy component to the Household page to give agents an at-a-glance view of all policies in a household. New options on the Policy component give you greater control over the information you want to display on the component. And now we support account relationships on key Insurance objects to let you easily manage external users' access to Insurance records.

IN THIS SECTION:

Policy Component: Household Policies, Record Type Filters, and More

Add the Policy component to a Household page and let your agents view all household policies in one place. Use record type filters to tailor the information on the Policy component to best suit your agents' needs. With the new New Policy button on the Policy component, agents can quickly add policy records without leaving the page they're on.

Simplify Partner Access to Insurance Records with Account Relationships

Remove the complexity from sharing data with your partner distributors by creating external account hierarchies and account relationships for claim, customer property, business milestone, insurance policy, and person life event records. With account relationships, you can model your policy distribution channels without creating multiple public groups or handling complex data sharing rules.

Print Insurance Record Details with Printable View

Use the Printable View button on Insurance record details in Lightning communities to generate a condensed, minimalist view for printing.

Analytics for Insurance: Predictive App Template, Date Filtering, and Data Access for Sales Managers

Use predictions from the Einstein Discovery for Insurance Analytics app to help retain customers. You can use the fiscal calendar to filter data in your dashboards. Customize data access to sales managers so that they can view only the data of users below them in the hierarchy.

Policy Component: Household Policies, Record Type Filters, and More

Add the Policy component to a Household page and let your agents view all household policies in one place. Use record type filters to tailor the information on the Policy component to best suit your agents' needs. With the new New Policy button on the Policy component, agents can quickly add policy records without leaving the page they're on.

IN THIS SECTION:

Give Agents a Consolidated View of All Household Policies

The powerful and versatile Policy component is now supported on the Household page. With an at-a-glance view of all household policies and related metrics on the Policy component, agents can easily identify new opportunities and devise cross-sell and upsell plans.

Streamline Policy List and Related Metrics

Unclutter the Policy component, and show just the information that helps your agents better understand and address their clients' needs. When you exclude a policy record type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

Add Policy Records Directly from the Policy Component

The Policy component has a new New Policy button that lets agents add policy records without leaving the page they're on. For example, when an agent learns about competitors' policies with a client, the agent can add records for those policies directly from the Policy component.

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Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the FSC Insurance permission set to use this feature.

How: Edit the household record page, and drag the Policy component on the page.

SEE ALSO:

Financial Services Cloud Administrator Guide: Give Agents a Consolidated View of Household Policies and Claims (can be outdated or unavailable during release preview)

Streamline Policy List and Related Metrics

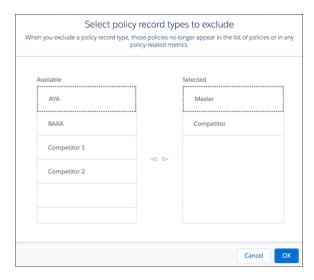
Unclutter the Policy component, and show just the information that helps your agents better understand and address their clients' needs. When you exclude a policy record type, those policies no longer appear in the list of policies or in any policy-related metrics on the Policy component.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the FSC Insurance permission set to use this feature.

Why: Use record type filters to show different sets of policies on different instances of the Policy component. For example, you can have two instances of the Policy component on a policyholder record page—one for your policies and another for your competitors' policies. With a side-by-side view of your policies and competitors' policies, agents can identify cross-sell and upsell opportunities.

How: Edit the record page, and select the Policy component. In the properties pane, click **Select**, and then select the policy record types that you want to exclude.



SEE ALSO:

Financial Services Cloud Administrator Guide: Filter Policies by Policy Record Type (can be outdated or unavailable during release preview)

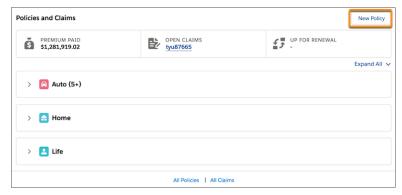
Add Policy Records Directly from the Policy Component

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Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the FSC Insurance permission set to use this feature.

How: On the Policy component, click New Policy.



Simplify Partner Access to Insurance Records with Account Relationships

Remove the complexity from sharing data with your partner distributors by creating external account hierarchies and account relationships for claim, customer property, business milestone, insurance policy, and person life event records. With account relationships, you can model your policy distribution channels without creating multiple public groups or handling complex data sharing rules.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: External users with Partner Community and Customer Community Plus licenses have access to account relationships. The Create and Set Up Communities permission is required for users who want to create and manage account relationship data sharing rules.

Why: The Claim, Customer Property, Business Milestone, Insurance Policy, and Person Life Event objects now support account relationships.

Print Insurance Record Details with Printable View

Use the Printable View button on Insurance record details in Lightning communities to generate a condensed, minimalist view for printing.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: Select Printable View from a list or record detail.

Printable View supports record details for these objects:

- Insurance Policy
- Insurance Policy Coverage
- Insurance Policy Asset
- Insurance Policy Participant
- Claim
- Claim Item
- Claim Participant

Analytics for Insurance: Predictive App Template, Date Filtering, and Data Access for Sales Managers

Use predictions from the Einstein Discovery for Insurance Analytics app to help retain customers. You can use the fiscal calendar to filter data in your dashboards. Customize data access to sales managers so that they can view only the data of users below them in the hierarchy.

IN THIS SECTION:

Maximize Policy Renewals with Einstein Discovery for Insurance Analytics

Use the Einstein Discovery for Insurance Analytics template to create an app that gives you insights on the likelihood of policy renewals and helps you retain customers.

Filter Data by Fiscal Calendar

Filter your dashboards' data by fiscal years, months, or quarters based on the standard fiscal calendar settings in your Salesforce org.

Customize Data Access for Sales Managers

Save sales managers time by letting them see only the data that belongs to users below them in the hierarchy.

Maximize Policy Renewals with Einstein Discovery for Insurance Analytics

Use the Einstein Discovery for Insurance Analytics template to create an app that gives you insights on the likelihood of policy renewals and helps you retain customers.

Where: This change applies to Lightning Experience in Professional, Performance, and Unlimited editions where Financial Services Cloud for Insurance is enabled.

Who: To create an app from the Einstein Discovery for Insurance Analytics template, you must have the FSC Analytics Plus add-on license.

Why: The dashboard visualizations help you focus on policies with high gross written premium and low renewal probability.



How: Go to Analytics Studio, click **Create**, and select **App**. Select **Einstein Discovery for Insurance Analytics**, and follow the instructions in the wizard to create your app.

Filter Data by Fiscal Calendar

Filter your dashboards' data by fiscal years, months, or quarters based on the standard fiscal calendar settings in your Salesforce org.

Where: This change applies to Lightning Experience in Professional, Performance, and Unlimited editions where Financial Services Cloud for Insurance is enabled.

Who: To create an app from the Analytics for Insurance template, you must have the FSC Analytics Plus add-on license.

How: Go to Analytics Studio, click **Create**, and select **App**. Select **Analytics for Insurance**, and follow the instructions in the wizard to create your app.

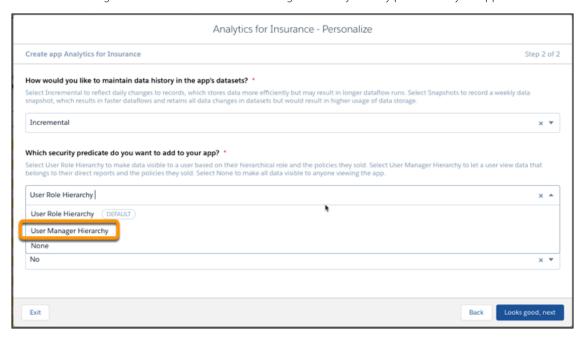
Customize Data Access for Sales Managers

Save sales managers time by letting them see only the data that belongs to users below them in the hierarchy.

Where: This change applies to Lightning Experience in Professional, Performance, and Unlimited editions where Financial Services Cloud for Insurance is enabled.

Who: To create an app from the Analytics for Insurance template, you must have the FSC Analytics Plus add-on license.

How: Use the configuration wizard to add the User Manager Hierarchy security predicate to your app.



Wealth Management for Financial Services Cloud: New Prediction Capabilities

Use the new Predict apps in Einstein Analytics to increase your Wealth Management capabilities. Powered by Einstein Discovery stories, the new Predict apps create predictions on the churn of your client accounts and the likelihood to grow your account assets.

IN THIS SECTION:

Predict Client Churn Risk for Wealth Management

The Predict Client Churn Risk for Wealth Management Analytics app assists financial advisors to predict customer churn. The app prescribes corrective actions to help minimize occurrences of churn using the power of Einstein Discovery. Use the template to create the app with dashboard visualizations of the predictive risk of account churn.

Predict the Likelihood to Add Assets for Wealth Management

The Predict Likelihood to Add Assets for Wealth Management Analytics app assists financial advisors to forecast the likelihood of investors adding assets to accounts. The app prescribes actions on how to increase the likelihood using the power of Einstein Discovery. Use the template to create the app with an embedded dashboard visualization of the predictive likelihood to add assets to an account.

Predict Client Churn Risk for Wealth Management

The Predict Client Churn Risk for Wealth Management Analytics app assists financial advisors to predict customer churn. The app prescribes corrective actions to help minimize occurrences of churn using the power of Einstein Discovery. Use the template to create the app with dashboard visualizations of the predictive risk of account churn.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Predict Client Churn Risk for Wealth Management Analytics app is only for Salesforce Financial Services Cloud users. To create an app from the Predict Client Churn Risk for Wealth Management Analytics template, you must also have the FSC Analytics Plus add-on license.

How: In Analytics Studio, click **Create** and select **App**. Find and select **Predict Client Churn Risk for Wealth Management Analytics**. Then follow the instructions in the wizard to create your app.

Predict the Likelihood to Add Assets for Wealth Management

The Predict Likelihood to Add Assets for Wealth Management Analytics app assists financial advisors to forecast the likelihood of investors adding assets to accounts. The app prescribes actions on how to increase the likelihood using the power of Einstein Discovery. Use the template to create the app with an embedded dashboard visualization of the predictive likelihood to add assets to an account.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Predict Likelihood to Add Assets for Wealth Management Analytics app is only for Salesforce Financial Services Cloud users. To create an app from the Predict Likelihood to Add Assets for Wealth Management Analytics template, you must also have the FSC Analytics Plus add-on license.

How: In Analytics Studio, click **Create** and select **App**. Find and select **Predict Likelihood to Add Assets for Wealth Management Analytics**. Then follow the instructions in the wizard to create your app.

Compliant Data Sharing: Advanced Data Sharing Configuration to Improve Compliance (GA)

Improve compliance with data sharing regulations and company policies by using the new Compliant Data Sharing (CDS) feature. Control what information gets shared with whom, without writing complex code.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Financial services firms want to follow privacy regulations and company data sharing policies when sharing client or deal data that contains confidential or material nonpublic information. Such data should only be accessible by users who need it based on their role regarding a specific client or deal.

Compliant Data Sharing features make it easier to control who can access specific records. CDS works seamlessly with existing Salesforce data sharing features. It provides extra access rules, but otherwise does not override sharing behavior from existing features.

How: First, clone the Financial Services Cloud Extension permission set. Add the user permissions **Configure Compliant Data Sharing** and **Use Compliant Data Sharing** to the cloned permission set. Assign the permission set to users or user profiles that require access to Compliant Data Sharing.

To enable CDS features for specific objects, go to **Compliant Data Sharing** > **Object Enablement Settings** in Setup. Select the objects that would benefit from enhanced data sharing rules. As of the Winter '21 release, CDS can be applied to Account and Opportunity objects.

Also in Setup, define **Participant Roles** for each object. A Participant Role defines the access level for any user assigned to that role for a specific record. For example, a Senior Banker role can get full Read/Write access to an opportunity record, while an Associate role gets Read Only access.

Add the Account Participant related list to account page layouts, and the Opportunity Participant related list to opportunity page layouts. Manage sharing assignments in the participant related list for each object. For example, the Account Participant related list lets users

assign people to roles for a specific account record. When a user is assigned to a role, they get record access based on the role's default access level.

Actionable Relationship Center: Manage Complex Relationships and Related Lists

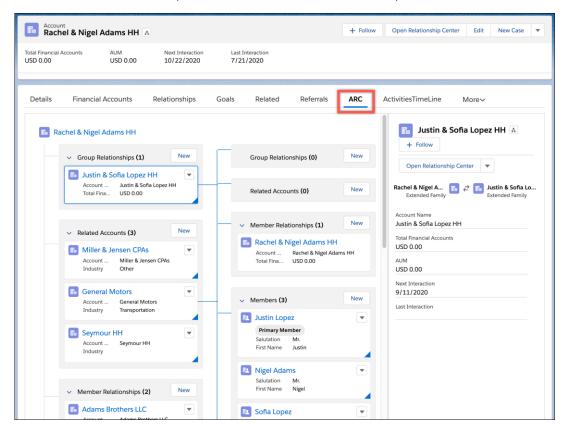
Create and edit account and contact relationships and other related records in one convenient interface using Actionable Relationship Center (ARC). ARC displays complex relationships and related lists at-a-glance. Now you can create and edit relationships and related records from the same interface. ARC now does nearly everything the Relationship Map component can do, and displays related lists also.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: It's often faster and easier to manage data from one dynamic component than by switching among multiple pages. You can now perform common relationship management tasks directly in the ARC interface.

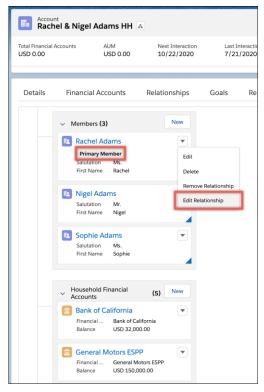
How: Assign the Financial Services Cloud Extension permission to users or user profiles that need access to ARC. Then use Lightning App Builder to place the **ARC - Financial Services Cloud** standard component onto an account or contact page layout.

Click the ARC tab on an account page to view relationships and related records for that account. Click an item that represents an account or contact to see its details and expand its own account and contact relationships.

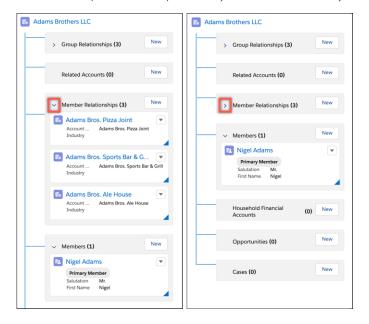


When a contact is the primary member of a household or group, ARC shows a Primary Member indicator on the card.

Use the **New** button on an account, contact, relationship, or related list card to create a new relationship or record. Take advantage of contextual menus and the **Edit Relationship** menu item to change relationship details.



Cards can be expanded or collapsed to let you see the information you need in one view.



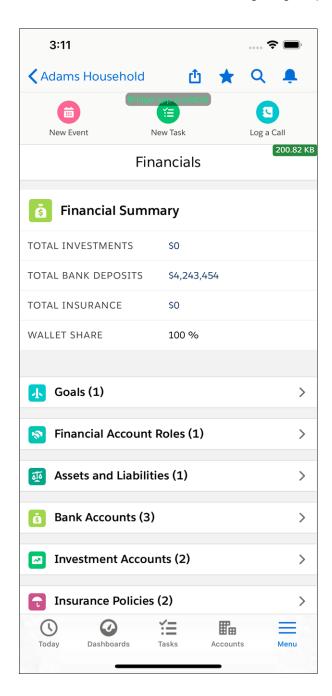
Stay Productive with Financial Services Cloud Lightning Components for Mobile

Boost remote user productivity by including Financial Services Cloud Lightning Components in the Salesforce mobile app.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Give Salesforce Mobile users access to the features that they need to stay productive away from their desks.

How: You can access Financial Services Cloud Lightning Components in the Salesforce mobile app for iOS and Android.



Enable pages for the Phone form factor in Lightning App Builder so those pages appear on mobile devices. Use Lightning App Builder to add components to new or existing page layouts.

The following table describes the Financial Services Cloud components that are now mobile-enabled.

Table 1: Mobile-Enabled Components

Component	Description
Action Plan	View action plans and task items.

Component	Description
Assets and Liabilities	View, edit, and create Assets and Liabilities records for all kinds of accounts.
Bank Account	View, edit, and create Bank Account records for all kinds of accounts.
Client Record Detail	View Client Record Detail for all kinds of accounts.
Financial Account Role	View, edit, and create Financial Account Roles for all kinds of accounts.
Financial Goal	View Financial Goals for Household and Person accounts. Edit and create Financial Goals for Household accounts only.
Financial Summary	View Financial Summary information for all kinds of accounts.
Insurance Policy	View, edit, and create Insurance Policy records for all kinds of accounts.
Investment Account	View, edit, and create Investment Accounts for all kinds of accounts.
Related Accounts	View Related Accounts for all kinds of accounts. Edit and create Related Accounts for Households and Business Accounts only.
Related Contacts	View Related Contacts for Households and Business Accounts only.

Record Rollups for Financial Services Cloud

Improve record rollup performance with these enhancements.

IN THIS SECTION:

Gain Visibility into Household Cases with Case Record Rollups

Give your users a consolidated view of all the cases a household owns by rolling up case records at the household level. Agents can keep track of and focus on all active cases of a household in one place without going through multiple related lists.

Optimize Record Rollups

Use the new Record Rollup Optimization (Beta) org preference to improve record rollup performance.

Get Improved Performance and Granular Control Over Batch Record Rollups

Experience faster record rollups at the household level when performing rollups in batches. The new Record Rollup Configuration custom setting lets you configure various rollup settings for each object individually. For example, you can define a batch size to limit the number of records in each batch. When you run the batch job to roll up records, these settings help improve the performance of the batch job.

Gain Visibility into Household Cases with Case Record Rollups

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Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: Add the Household Cases related list to the Household page layout.

Optimize Record Rollups

Use the new Record Rollup Optimization (Beta) org preference to improve record rollup performance.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: From Setup, under Financial Services General Settings, enable Record Rollup Optimization (Beta).

SEE ALSO:

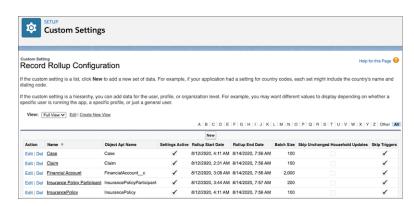
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Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: On the Custom Settings page in Setup, click **Manage** next to Record Rollup Configuration. Then click **New** to add objects and define rollup settings for them.





Note: If you enabled the new Record Rollup Optimization (Beta) org preference, use the new HouseholdAssignmentBatchable batch job instead of GroupAssignmentBatchable to roll up records in batches.

SEE ALSO:

Optimize Record Rollups

Financial Services Cloud Administrator Guide: Define Rollup Settings for Objects (can be outdated or unavailable during release preview)

Financial Services Cloud Administrator Guide: Record Rollup Batch Jobs (can be outdated or unavailable during release preview)

Speed up Interaction Date Calculations

See Next and Last Interaction Date fields update faster than before. Activate the new Use Standard Triggers metadata types for Tasks and Events to speed up interaction date calculations for those objects.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How:

Activate standard triggers for Events and Tasks. On the Custom Metadata Types page in Setup, click **Use Standard Trigger**. Then click **Edit** next to EventTrigger, and on the Event Trigger page, turn on the **Active** checkbox and save your changes. Follow similar steps to active the Task Trigger.

Encrypt Identity Document Fields

You can now encrypt fields on the documents you use to identify Financial Services Cloud clients. When you encrypt the Document Number, Issue Date, and Expiration Date fields, you add another layer of protection to the data your clients entrust to your care.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where both Financial Services Cloud and Shield Platform Encryption are enabled.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply the deterministic encryption scheme to the Document Number field.

SEE ALSO:

Which Standard Fields Can I Encrypt?

New and Changed Financial Services Cloud Object Fields

Do more with the new and updated Financial Services Cloud objects.

Relationship Map

Get an expanded view of hierarchical client relationships in the Relationship Map.

Use the values in the new AssociationType field on the AccountAccountRelation object.

Compliant Data Sharing

Define access levels by role for supported objects.

Use the new ParticipantRole object.

Assign a user to a participant role for an account record.

Use the new AccountParticipant object.

Assign a user to a participant role for an opportunity record.

Use the new OpportunityParticipant object.

New and Changed Financial Services Cloud Metadata Types

Do more with the new and changed metadata types.

Insurance

Create account relationships for business milestones, claims, customer properties, insurance policies, and person life events

Use the new values in the entityType and accountToCriteriaField fields on the AccountRelationshipShareRule metadata type.

The entityType field shows these additional values for Insurance for Financial Services Cloud.

- BusinessMilestone
- Claim
- CustomerProperty
- InsurancePolicy
- PersonLifeEvent
- The accountToCriteriaField field shows these additional values for Insurance for Financial Services Cloud.
 - BusinessMilestone.OwnerId
 - BusinessMilestone.PrimaryAccountId
 - Claim.AccountId
 - Claim.OwnerId
 - CustomerProperty.OwnerId
 - CustomerProperty.PrimaryOwnerId
 - InsurancePolicy.NameInsuredId
 - InsurancePolicy.OwnerId
 - PersonLifeEvent.OwnerId

Industries Settings

Enable Compliant Data Sharing features for accounts and opportunities

Use the new enableCompliantDataSharingForAccount and enableCompliantDataSharingForOpportunity fields on the IndustriesSettings metadata type.

Enable optimized record rollup calculations (beta)

Use the new enableRecordRollup field on the IndustriesSettings metadata type.

REST API

Financial Services Cloud REST API includes enhanced calls.

Mortgage

Create or Update Mortgage Applications Passing a Salesforce or External Lender ID

Make a PATCH request to

/services/data/v50.0/connect/financialservices/mortgages/id/<Salesforce Id of ResidentialLoanApplication record> to create or update an existing mortgage application using a Salesforce record ID

Make a PATCH request to

/services/data/v50.0/connect/financialservices/mortgages/externalId/<External Id of ResidentialLoanApplication record> to create or update an existing mortgage application using an external record ID.

In response, a "created": false/true affirms a new record was created. If false is returned, the existing mortgage application is updated.

Generate Account or Opportunity Records when Creating or Upserting a Mortgage Application

Create or Upsert a mortgage application with linked Account or Opportunity records by including accountId or opportunityId or their objects in a POST or PATCH request.

If both accountId (or opportunityId) and account (or opportunity) objects are passed as input, lds are given preference and objects ignored.

Pass Account and Opportunity objects only for new mortgage applications using the POST API or Upsert in create mode. Account and Opportunity objects are not valid inputs when upserting an existing record.

The API supports creating, but not updating existing, Account and Opportunity records.

Public Sector Solutions: Licensing and Permitting Management Made Simpler, Faster, and Transparent (Generally Available)

Public Sector Solutions, built on the Salesforce platform, brings the benefits of digital transformation to governments and public agencies. Now you can build simpler, faster, and more transparent processes that delight your constituents and employees alike.

IN THIS SECTION:

Transform Government Services with Public Sector Solutions

You can't run a government agency without licensing, permitting, and enforcement processes, but now you can make them less of a pain point for users on both sides of the counter. Salesforce Public Sector Solutions let reviewers and inspectors process applications, manage inspections, and encourage regulatory compliance at a whole new level of efficiency.

Define Diverse Authorization Processes with Easily Configurable Data Model

Create authorization processes in a flash with the powerful Public Sector Solutions data model. By defining values for a few key parameters, you can configure authorization processes for various licenses, permits, registrations, and certifications.

Give a Consolidated View of Applications with the Hierarchical View Component

Help your application reviewers easily and efficiently manage applications. When you add the Hierarchical View component to an account record page, application reviewers get a consolidated view of account's applications, inspections, violations, enforcement actions, and public complaints. With greater visibility into these details, reviewers can better understand and address constituents' licensing and permitting needs.

Plan Effective Inspections with the Inspection Management Mobile App

The Public Sector: Inspection Management mobile app provides field inspectors with visit details such as locations to visit, priority, estimated visit time, and even navigation instructions. Field inspectors can view inspection details and special instructions and record their findings right in the mobile app. They can also check the associated regulatory codes and attach files when they enter their observations.

Create a Feature-Rich Portal for Constituents' Licensing and Permitting Needs

Offer your constituents a comprehensive view of their licensing and permitting processes by creating a portal that functions as a one-stop shop. With the portal, constituents can apply for and renew licenses and permits, see their applications, scheduled inspections, violations, and enforcement actions. And they can file complaints against a business and get notifications when action is taken on a complaint. You can also use the knowledge management features of the portal to create a treasure trove of articles for constituents and provide them a digital engagement platform.

Help Constituents Plan and Prioritize Applications

Save constituents time and help them avoid rejected applications by publishing permit dependency information on your portal. When constituents search for a business type, they can see all the permits and licenses required for that business type. They can also see the order in which to apply for permits and licenses, smoothing their path to approval.

Accommodate Diverse Licensing and Permitting Needs with Dynamic Forms

Use Vlocity Omniscript designer to create dynamic assessment or application forms for licenses and permits. A dynamic form uses the response from one step to populate the elements of the next step. For example, a dynamic application form for a building permit automatically populates the next field based on whether the user selects residential or commercial as the building type.

Issue Licenses and Permits Faster with Automated Approval Processes

Automate approval processes by specifying the sequence of steps required to approve license or permit applications. Each step determines which records advance to the next step, and who to assign approval requests to. You can also automate the field updates to indicate the status of an application after a step is completed. And you can associate actions such as email alerts to notify applicants when their application's status changes.

Track Code Violations and Enforce Compliance to Regulatory Standards

Set up an automated process to ensure that businesses and individuals comply with regulatory standards. Define code violations and enforcement actions, and map them to assessment indicator results. When an inspector enters an assessment that indicates a violation, applicants and reviewers can see that violation and take necessary action. If the applicants fail to comply, a compliance officer can initiate an enforcement action.

Public Sector Solutions Have New Objects

Salesforce Public Sector Solutions provide a rich set of standard and custom objects to store and access information.

Public Sector Solutions Have New Metadata Type

Map object record types to an application with Public Sector Solutions' new metadata types.

Transform Government Services with Public Sector Solutions

You can't run a government agency without licensing, permitting, and enforcement processes, but now you can make them less of a pain point for users on both sides of the counter. Salesforce Public Sector Solutions let reviewers and inspectors process applications, manage inspections, and encourage regulatory compliance at a whole new level of efficiency.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

Why: Constituents can use your Public Sector Solutions portal to apply for licenses and permits, track applications, view inspections details, and monitor violations and enforcement actions. And the portal employs the powerful knowledge management features of the Salesforce platform to help you keep constituents informed and engaged. Keeping constituents in the loop can help increase compliance rates for licenses and permits.

Define Diverse Authorization Processes with Easily Configurable Data Model

Create authorization processes in a flash with the powerful Public Sector Solutions data model. By defining values for a few key parameters, you can configure authorization processes for various licenses, permits, registrations, and certifications.

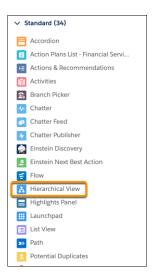
Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled

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Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: Drag the Hierarchical View component to the account, application, inspection, case, or complaint record page.



SEE ALSO:

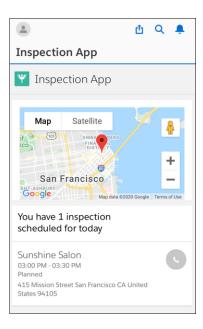
Salesforce Help: Configure Unified View of Government (can be outdated or unavailable during release preview)

Plan Effective Inspections with the Inspection Management Mobile App

The Public Sector: Inspection Management mobile app provides field inspectors with visit details such as locations to visit, priority, estimated visit time, and even navigation instructions. Field inspectors can view inspection details and special instructions and record their findings right in the mobile app. They can also check the associated regulatory codes and attach files when they enter their observations.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: Launch the Salesforce App on your mobile device. From the App Launcher, select **Public Sector: Inspection Management** and tap **Visits**.



SEE ALSO:

Salesforce Help: Configure Inspections (can be outdated or unavailable during release preview)

Create a Feature-Rich Portal for Constituents' Licensing and Permitting Needs

Offer your constituents a comprehensive view of their licensing and permitting processes by creating a portal that functions as a one-stop shop. With the portal, constituents can apply for and renew licenses and permits, see their applications, scheduled inspections, violations, and enforcement actions. And they can file complaints against a business and get notifications when action is taken on a complaint. You can also use the knowledge management features of the portal to create a treasure trove of articles for constituents and provide them a digital engagement platform.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

Who: Users need the Licensing and Permitting Management For Communities permission set to use this feature.

How: To configure your Salesforce Communities page, click Experience Builder from the menu, and drag components to the page.



SEE ALSO:

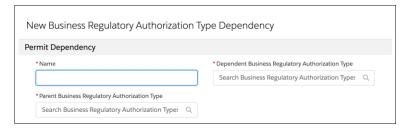
Salesforce Help: Manage Salesforce Communities (can be outdated or unavailable during release preview)

Help Constituents Plan and Prioritize Applications

Save constituents time and help them avoid rejected applications by publishing permit dependency information on your portal. When constituents search for a business type, they can see all the permits and licenses required for that business type. They can also see the order in which to apply for permits and licenses, smoothing their path to approval.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: Define the dependency using the Business Regulatory Authorization Type Dependency object.



SEE ALSO:

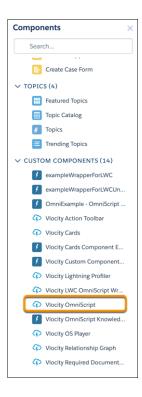
Salesforce Help: Configure Business Regulatory Authorization Type Dependencies (can be outdated or unavailable during release preview)

Accommodate Diverse Licensing and Permitting Needs with Dynamic Forms

Use Vlocity Omniscript designer to create dynamic assessment or application forms for licenses and permits. A dynamic form uses the response from one step to populate the elements of the next step. For example, a dynamic application form for a building permit automatically populates the next field based on whether the user selects residential or commercial as the building type.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: Create and save a dynamic form in Vlocity Omniscript designer. To add the form to your Salesforce Community page, use the Vlocity Omniscript component in Experience Builder.



SEE ALSO:

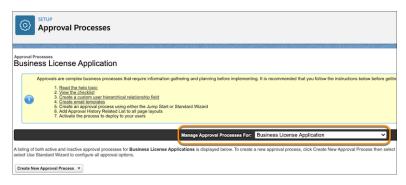
Salesforce Help: Design License Assessment and Application Forms (can be outdated or unavailable during release preview)

Issue Licenses and Permits Faster with Automated Approval Processes

Automate approval processes by specifying the sequence of steps required to approve license or permit applications. Each step determines which records advance to the next step, and who to assign approval requests to. You can also automate the field updates to indicate the status of an application after a step is completed. And you can associate actions such as email alerts to notify applicants when their application's status changes.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: From Setup, select Approval Processes. From the Manage Approval Processes For list, select an application process.



SEE ALSO:

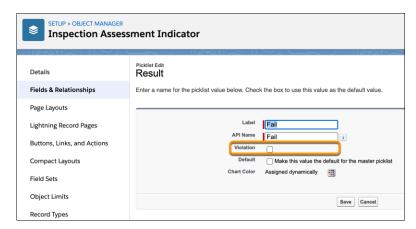
Salesforce Help: Set Up License Application Approval Process (can be outdated or unavailable during release preview)

Track Code Violations and Enforce Compliance to Regulatory Standards

Set up an automated process to ensure that businesses and individuals comply with regulatory standards. Define code violations and enforcement actions, and map them to assessment indicator results. When an inspector enters an assessment that indicates a violation, applicants and reviewers can see that violation and take necessary action. If the applicants fail to comply, a compliance officer can initiate an enforcement action.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: From Object Manager, find and open Inspection Assessment Indicator. Create a picklist value on the Result field and mark it as a violation



SEE ALSO:

Salesforce Help: Create a Violation Enforcement Action (can be outdated or unavailable during release preview)

Public Sector Solutions Have New Objects

Salesforce Public Sector Solutions provide a rich set of standard and custom objects to store and access information.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

Store information related to the association between an asset and the application for the license of that asset Use the new AuthApplicationAsset object.

Create and store operating hours during which an authorization is valid for a place

Use the new AuthLocationAccessSchedule object.

Store information related to the association between a location and the application for the license of that location Use the new AuthApplicationPlace object.

Store information related to the association of a permit to the permit dependency in a given business context Use the new BusRegAuthTypeDependency object.

Store details about the business on the license or permit application.

Use the new BusinessProfile object.

Store information related to the association of business activities and the licenses or permits applicable for them Use the new BusinessRegulatoryAuthType object.

Create an authorization that are issued by a regulatory agency

Use the new BusinessLicense object.

Store an application form submitted by a business owner

Use the new BusinessLicenseApplication object.

Create an association between authorization activity and license or permit type

Use the new BusRegAuthorizationType object.

Create a category of activity both business and individual

Use the new BusinessType object.

Create and store an instance of a training course with location and date details of training courses

Use the new CourseOffering object.

Create and store examinations authorized by a government authority that qualify a license or permit

Use the new Examination object.

Create and store the assessment indicators recorded during an inspection

Use the new InspectionAssessmentInd object.

Store the license or permit application form submitted by an individual

Use the new Individual Application object.

Create and store a type of inspection or assessment conducted during a visit

Use the new InspectionType object.

Store information related to the examinations taken by a person

Use the new PersonExamination object.

Store the saved applications and pre-screening forms

Use the new PreliminaryApplicationRef object.

Store the complaints submitted by public users

Use the new PublicComplaint object.

Create an organization or government agency that provides authorization

Use the new RegulatoryAuthority object.

Create common attributes used for different types of license or permit applications for businesses or occupations

Use the new RegulatoryAuthApplication object.

Create an authorization that can be issued by the regulatory body

Use the new RegulatoryAuthorizationType object.

Create an association between an authorization type and a product

Use the new RegAuthorizationTypeProduct object.

Store information related to the regulation code enforced by the regulatory body

Use the new RegulatoryCode object.

Store the regulatory codes and the assessment indicator definitions associated with them

Use the new RegulatoryCodeAssessmentInd object.

Store the regulatory code violations captured across multiple follow-up inspections

Use the new RegulatoryCodeViolation object.

Store the trainings completed by a person

Use the new TrainingParticipant object.

Store trainings authorized by a government authority that qualify a license or permit

Use the new TrnCourse object.

Create and store the action that a regulatory authority takes to address violations

Use the new ViolationEnforcementAction object.

Create and store violations types for licenses and permits

Use the new ViolationType object.

Create and store violation types associated with assessment indicator definitions

Use the new ViolationTypeAssessmentInd object.

Public Sector Solutions Have New Metadata Type

Map object record types to an application with Public Sector Solutions' new metadata types.

Maps object record types to an application

Use the new ApplicationRecordTypeConfig object. Introduced in API version 50.0.

Consumer Goods Cloud: Direct Store Delivery, Visit Recommendations, and More

Ensure that sales reps visit the right stores at the right time with Einstein recommended visits. Use delivery tasks to keep your products in stock at stores. Help your sales managers and field reps stay agile with Consumer Goods objects now available on mobile.

IN THIS SECTION:

Einstein Visit Recommendations: Plan Visits to the Right Stores at the Right Time

Sales managers can stop worrying about which stores their sales reps must visit next because Einstein does it for them. Visit recommendations are based on and tailored to address your unique business requirements. Create one or more strategies based on your business requirements in Einstein Next Best Action.

Ensure Timely Deliveries to Stores with Delivery Tasks

When sales managers view all the orders from their region, they can prioritize orders based on store performance. Sales managers can create and assign delivery tasks to drivers, who can see the delivery tasks on their mobile devices.

Visit Execution: More Flexibility and Improved Productivity

Sales managers can now create custom tasks with standard Consumer Goods objects. And field reps are more flexible because they can take charge of their day and capture more during visits.

Other Changes to Consumer Goods Cloud

Learn about other small but important improvements to Consumer Goods Cloud.

Enhance Your Stores' Retail Execution

The new Einstein Analytics for Consumer Goods dashboards give you easy access to retail execution KPIs that help you perform merchandiser activities effectively. Get actionable insights on store compliance, last store visit, inventory compliance, product performance, and account hierarchy. Field reps can use the Field Representative Summary dashboard to track their performance and compare it with their team's average. Customize your app to ensure that a sales manager can see only data that belongs to users below them in the hierarchy.

Consumer Goods Cloud Has New Objects

Do more with the new Consumer Goods Cloud and Einstein Visit Recommendations objects.

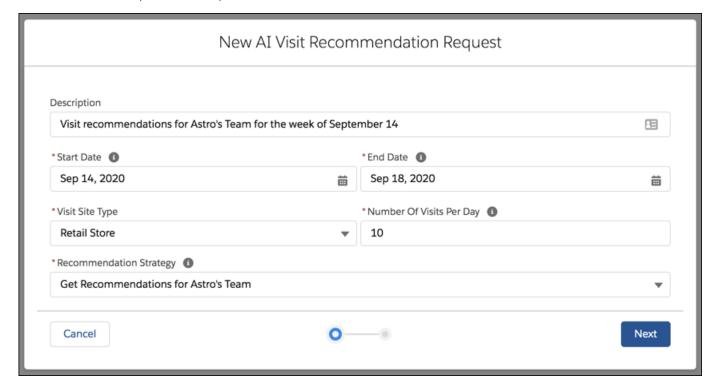
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Sales managers can stop worrying about which stores their sales reps must visit next because Einstein does it for them. Visit recommendations are based on and tailored to address your unique business requirements. Create one or more strategies based on your business requirements in Einstein Next Best Action.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

Who: Users need the Retail Execution Lightning Plus permission set to use this feature.

How: In Setup, search for and select **Einstein Visit Recommendations**. Turn on Einstein Visit Recommendation. In Next Best Action, define a strategy that provides the business logic for Einstein to provide recommendations. Sales managers and field reps can now create visit recommendation requests for a time period that Einstein uses to make visit recommendations.



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SEE ALSO:

Salesforce Help: Einstein Visit Recommendations (can be outdated or unavailable during release preview)
Salesforce Help: Delete Recommendations (can be outdated or unavailable during release preview)

Ensure Timely Deliveries to Stores with Delivery Tasks

When sales managers view all the orders from their region, they can prioritize orders based on store performance. Sales managers can create and assign delivery tasks to drivers, who can see the delivery tasks on their mobile devices.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

Who: Users need the Lightning Direct Store Delivery permission set to use this feature.

How: To create a delivery task, use an action plan template. Assign the template to a visit to add the delivery task to the visit. After drivers complete their deliveries, they can record the number of items delivered.



SEE ALSO:

Salesforce Help: Associate Delivery Task to Action Plan Template (can be outdated or unavailable during release preview)

Visit Execution: More Flexibility and Improved Productivity

Sales managers can now create custom tasks with standard Consumer Goods objects. And field reps are more flexible because they can take charge of their day and capture more during visits.

IN THIS SECTION:

Create Custom Tasks Based on Standard Consumer Goods Objects

Sales managers can quickly create custom tasks on any standard Consumer Goods object for which the HasActivities attribute is enabled. Creating a custom task no longer requires creating a custom object first. For example, to capture information about a store's performance, a sales manager can create a custom task with the Retail Store object.

Filter and Sort Your Visits

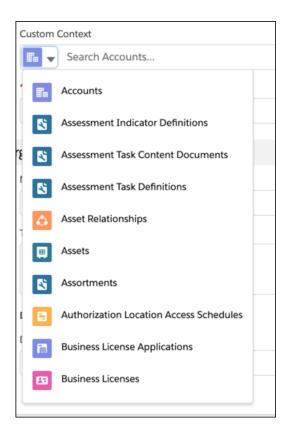
Field reps have a new option to help them stay on top of their visits. They can filter their visits based on date, priority, and status. They can also sort their visits by date and time, optimized route, or priority. The default visit list is sorted by planned start time and filtered by today's date.

Create Custom Tasks Based on Standard Consumer Goods Objects

Sales managers can quickly create custom tasks on any standard Consumer Goods object for which the HasActivities attribute is enabled. Creating a custom task no longer requires creating a custom object first. For example, to capture information about a store's performance, a sales manager can create a custom task with the Retail Store object.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

How: To create a custom task, select a standard Consumer Goods object in the Custom Context field.



SEE ALSO:

Salesforce Help: Create a Retail Store KPI (can be outdated or unavailable during release preview)

Filter and Sort Your Visits

Field reps have a new option to help them stay on top of their visits. They can filter their visits based on date, priority, and status. They can also sort their visits by date and time, optimized route, or priority. The default visit list is sorted by planned start time and filtered by today's date.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

How: On the Visits list page, click the filter and sort icon.

Other Changes to Consumer Goods Cloud

Learn about other small but important improvements to Consumer Goods Cloud.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

Why: You can now easily access more Consumer Goods objects from mobile devices, Salesforce App Launcher, and Salesforce Communities.

Enjoy greater flexibility on the go

More Consumer Goods Cloud are now accessible from mobile devices. Sales managers and field reps can now manage promotions, stores, visits, and more while they're on the go.

More objects in App Launcher

The Assessment Task Order, Assortment Product, In-Store Location, Promotion Channel, Promotion Product Category, Store Action Plan Template, Store Assortment, Store Product, and Promotion Product objects are now available in the Salesforce App Launcher.

Build stronger relationships with partners through communities

Consumer Goods Cloud are now available in Salesforce Communities. For information about contractual restrictions for using Consumer Goods Cloud in Salesforce Communities, contact your Salesforce account executive.

Add location maps and visit lists to visit record pages

Use the new Consumer Goods Visit Location Map and Consumer Goods Visit List components.

Consumer Goods App has a new icon in App Launcher

The new icon resonates better with the Consumer Goods application.



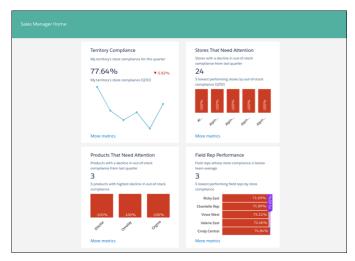
Enhance Your Stores' Retail Execution

The new Einstein Analytics for Consumer Goods dashboards give you easy access to retail execution KPIs that help you perform merchandiser activities effectively. Get actionable insights on store compliance, last store visit, inventory compliance, product performance, and account hierarchy. Field reps can use the Field Representative Summary dashboard to track their performance and compare it with their team's average. Customize your app to ensure that a sales manager can see only data that belongs to users below them in the hierarchy.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Analytics for Consumer Goods is only for Salesforce Consumer Goods Cloud users. To create an app from the Einstein Analytics for Consumer Goods template, you must also have the Einstein Analytics for Consumer Goods add-on license. The new Einstein Analytics for Consumer Goods dashboards are available to users with the Merchandiser and Contractor SKU.

Why: Help your managers and field reps improve retail execution in their stores.



Consumer Goods Cloud Has New Objects

Do more with the new Consumer Goods Cloud and Einstein Visit Recommendations objects.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

Who: To access this Consumer Goods Cloud object, users need Lightning Direct Store Delivery permission set. And to access these Einstein Visit Recommendations objects, users need the Lightning Retail Execution Plus permission set.

Associate shipments with a visit

Use the new DeliveryTask object.

New Fields on the RetailVisitKpi Object

Identify the visit associated with the RetailVisitKPI

Use the new Visit field on the RetailVisitKpi object.

Identify the RetailStoreKPI associated with the RetailVisitKPI

Use the new RetailStoreKPI field on the RetailVisitKpi object.

New Objects for Einstein Visit Recommendations

Create requests to generate visit recommendations

Use the new AiVisitRecommendationRequest object.

View all visit recommendations

Use the new AiVisitRecommendation object.

Manufacturing Cloud: Rebates (Pilot) and Enhanced Account Forecasting

Run volume and revenue-based rebate programs with Rebate Management. Manage rebate programs and calculate payouts in context by working with your Salesforce data including orders and products. Run rebate calculations flexibly, build trust among partners, and analyze payout information at the end of term or anytime. Define sales agreement renewal period. Select sales agreements for account forecasting. Use probability and product schedules of opportunities to calculate the value of opportunity metrics in account forecasts.

IN THIS SECTION:

Rebate Management: One-Stop Solution for Processing Rebates (Pilot)

Create rebate programs and specify the type of rebate, eligibility rules, and benefit structure including thresholds. Rebate payouts get processed at the cadence you select with the detail you want. Use the Manufacturing community template to collaborate with your partners. Get actionable insights on your rebates with Einstein Analytics for Rebates.

Renew Sales Agreements and Calculate Account Forecasts with Greater Flexibility

Determine the start of the sales agreement renewal period by specifying the day count before the end date. Get more accurate account forecasts by selecting the sales agreements to consider for forecasting. Use the opportunity probability percentage and opportunity product schedule values to calculate opportunity metric values in account forecasts.

Use Manufacturing Partner Community Template with Lightning External Apps Licenses

The Manufacturing community template is available with Lightning External Apps and Lightning External Apps Plus licenses.

Einstein Analytics for Manufacturing: Target Analysis and Data Access Control for Managers

Use the new Einstein Analytics for Manufacturing dashboards to track your performance against revenue targets. You can customize data access to sales managers so that they can view only data of users below them in the hierarchy.

Changed Manufacturing Cloud Metadata Types

Do more with these changed Manufacturing Cloud metadata types.

Changed Manufacturing Cloud Tooling API Objects

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Note: We provide Rebates to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Rebates isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

IN THIS SECTION:

Define Rebate Programs to Easily Calculate Rebate Amounts (Pilot)

Set up volume and revenue-based rebate programs and define the rebate payout frequency. Seamlessly integrate your Salesforce accounts with rebate programs by enrolling accounts as members in eligible programs. Create program types for every transaction, aggregated transactions, or by defining custom types. Specify a percentage of revenue or an amount per unit, or define your own rebate calculation rules.

Process Rebate Payouts (Pilot)

Define the payout calculation criteria and wait for the back-end processing to complete. Customize the calculation process using the flexible and extensible back-end process. View the payout details after the calculation process is complete. Track if the rebate payouts are processed, the date on which the payouts are generated, and the payout status.

Keep Your Partners Informed on Rebates Through Communities (Pilot)

Increase trust with your partners by collaborating using the Manufacturing community template.

Define Rebate Programs to Easily Calculate Rebate Amounts (Pilot)

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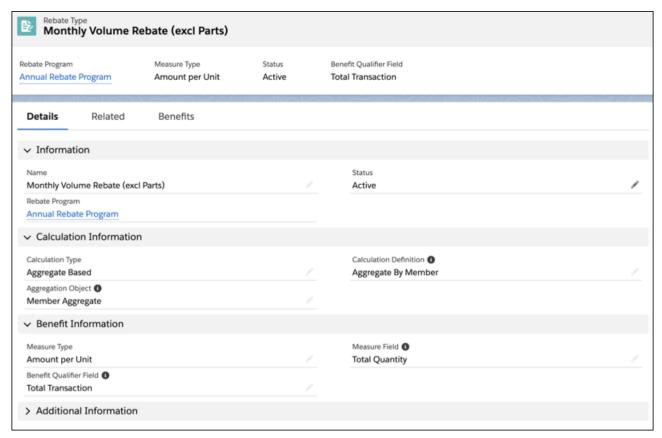


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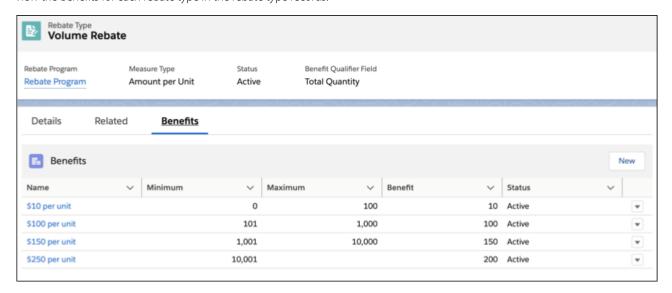
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: Create rebate programs and add members to the programs. Create payout periods and rebate program types.

View all the details associated with a rebate program in related lists of program records.



View the benefits for each rebate type in the rebate type records.



Process Rebate Payouts (Pilot)

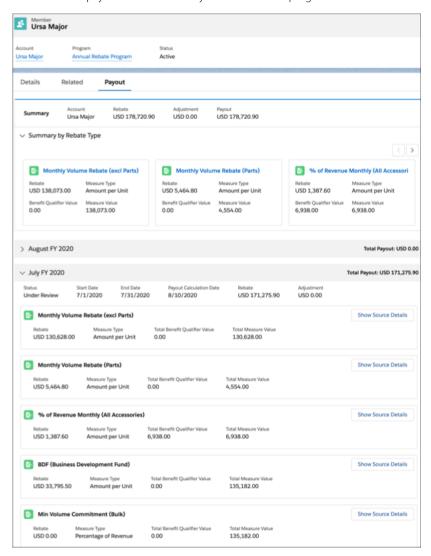
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Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: View the payout details in the Payout tab of rebate program member records.



Keep Your Partners Informed on Rebates Through Communities (Pilot)

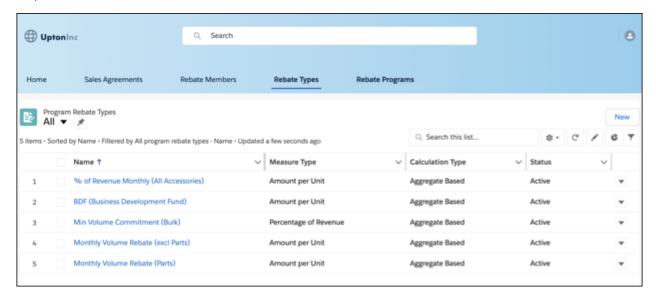
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Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: Use Rebates objects in the Manufacturing partner community by enabling them. The objects can be embedded in your community template.



Renew Sales Agreements and Calculate Account Forecasts with Greater Flexibility

Determine the start of the sales agreement renewal period by specifying the day count before the end date. Get more accurate account forecasts by selecting the sales agreements to consider for forecasting. Use the opportunity probability percentage and opportunity product schedule values to calculate opportunity metric values in account forecasts.

IN THIS SECTION:

Be Future Ready by Defining the Start of Sales Agreement Renewal Periods

Plan ahead for upcoming business deals by specifying the number of days that determine the start of the sales agreement renewal period.

Calculate Account Forecasts with Better Precision by Specifying Sales Agreements

Forecast account growth more accurately by selecting a list view with sales agreements to consider when calculating account forecasts. The sales agreements in the selected list view are considered when calculating the sales agreement values in account forecasts.

Use Opportunity Probability in Account Forecasting

Zero in on account forecast values with Opportunity Probability. The probability of opportunities associated with accounts is used to calculate opportunity quantity and revenue values in account forecasts.

Improve Account Forecasting by Using Opportunity Product Schedules (Pilot)

Use opportunity product schedules to make more reliable forecasts of quantities and revenues for accounts. The quantity and revenue schedule values for opportunity products are used to calculate opportunity quantity and revenue values in account forecasts.

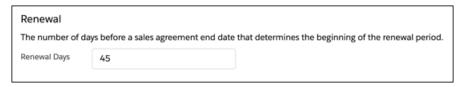
Be Future Ready by Defining the Start of Sales Agreement Renewal Periods

Plan ahead for upcoming business deals by specifying the number of days that determine the start of the sales agreement renewal period.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with the Manufacturing Cloud license and the Manufacturing Sales Agreements permission set.

How: Enter the number of days before the end date of a sales agreement that marks the beginning of the renewal period. This renewal period applies to all sales agreements in your Salesforce org. You can renew a sales agreement only after the renewal period starts. You can renew an agreement even after it has expired.



SEE ALSO:

Salesforce Help: Define Renewal Period for Sales Agreements (can be outdated or unavailable during release preview)
Salesforce Help: Renew a Sales Agreement (can be outdated or unavailable during release preview)

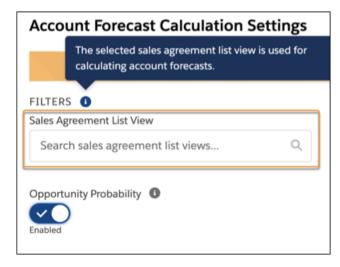
Calculate Account Forecasts with Better Precision by Specifying Sales Agreements

Forecast account growth more accurately by selecting a list view with sales agreements to consider when calculating account forecasts. The sales agreements in the selected list view are considered when calculating the sales agreement values in account forecasts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with the Manufacturing Cloud license and the Manufacturing Account Forecast permission set.

How: In the Account Forecasting Setup page, select a list view with sales agreements. After the list view is selected, account forecasts are updated with the latest values only after they are recalculated.



SEE ALSO:

Salesforce Help: Select Sales Agreement List View for Account Forecasting (can be outdated or unavailable during release preview)

Use Opportunity Probability in Account Forecasting

Zero in on account forecast values with Opportunity Probability. The probability of opportunities associated with accounts is used to calculate opportunity quantity and revenue values in account forecasts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with the Manufacturing Cloud license and the Manufacturing Account Forecast permission set.

How: In the Account Forecasting Setup page, turn on Opportunity Probability.



SEE ALSO:

Salesforce Help: Use Opportunity Probability to Calculate Account Forecasts (can be outdated or unavailable during release preview)

Improve Account Forecasting by Using Opportunity Product Schedules (Pilot)

Use opportunity product schedules to make more reliable forecasts of quantities and revenues for accounts. The quantity and revenue schedule values for opportunity products are used to calculate opportunity quantity and revenue values in account forecasts.



Note: We provide Opportunity Product Schedules in Account Forecasting to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Opportunity Product Schedules in Account Forecasting isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with the Manufacturing Cloud license and the Manufacturing Account Forecast permission set.

How: Enable Product Schedules in your Salesforce org. Then, on the Account Forecasting Setup page, turn on Opportunity Product Schedules. Account forecasts are updated with the latest values only after they're recalculated.

Use Manufacturing Partner Community Template with Lightning External Apps Licenses

The Manufacturing community template is available with Lightning External Apps and Lightning External Apps Plus licenses.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with the Manufacturing Cloud license and the Manufacturing Sales Agreements permission set.

Einstein Analytics for Manufacturing: Target Analysis and Data Access Control for Managers

Use the new Einstein Analytics for Manufacturing dashboards to track your performance against revenue targets. You can customize data access to sales managers so that they can view only data of users below them in the hierarchy.

IN THIS SECTION:

Track Your Sales Performance Against Targets

Use the Team Targets and My Targets dashboards to monitor your performance and your team's performance against revenue targets.

Customize Data Access for Sales Managers

Save sales managers time by letting them see only the data that belongs to users below them in the hierarchy.

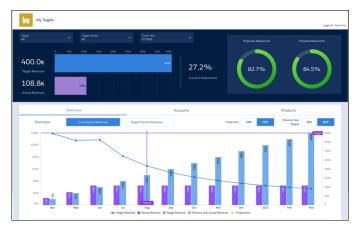
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Use the Team Targets and My Targets dashboards to monitor your performance and your team's performance against revenue targets.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Developer, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled. Analytics for Manufacturing is only for Salesforce Manufacturing Cloud users.

Who: To create an app from the Einstein Analytics for Manufacturing template, you must also have the Manufacturing Analytics Plus add-on license.

Why: The dashboard visualizations give account managers and executives a breakdown of their performance against revenue targets for their accounts and products.



How: Go to Analytics Studio, click **Create**, and select **App**. Select the **Analytics for Manufacturing** template, and follow the instructions in the wizard to create your app.

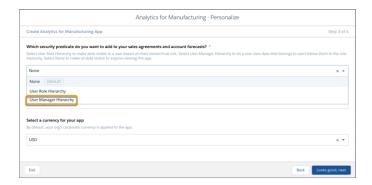
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Who: To create an app from the Einstein Analytics for Manufacturing template, you must also have the Manufacturing Analytics Plus add-on license.

How: Use the configuration wizard to add the User Manager Hierarchy security predicate to your sales agreements and account forecasts.



Changed Manufacturing Cloud Metadata Types

Do more with these changed Manufacturing Cloud metadata types.

Use the probability of opportunities closing to calculate account forecasts

Use the new opportunityProbabilityEnabled field on the AccountForecastSettings metadata type.

Select a list view with sales agreements to consider when calculating account forecasts

Use the new salesAgreementFilterId field on the AccountForecastSettings metadata type.

Changed Manufacturing Cloud Tooling API Objects

Do more with the changed Manufacturing Cloud Tooling API objects.

Use the probability of opportunities closing to calculate account forecasts

Use the new HasOpportunityProbability field on the AccountForecastSettings object.

Specify the number of days before the end date of sales agreements to determine the start of renewal period

Use the new RenewalPeriodDayCount field on the SalesAgreementSettings object.

Batch Management: Processing Large Volumes of Data with a Few Clicks (Pilot)

Process millions of records in your Salesforce org using Batch Management. Track the status and health of batch jobs using Monitor Workflow Services.



Note: We provide Batch Management to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Batch Management isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

IN THIS SECTION:

Define Batch Jobs to Process Large Record Volumes (Pilot)

Create batch jobs to process large volumes of data in a flow. Batch jobs process your data in manageable batch job parts. Use batch jobs to automate the execution of complex business processes across multiple objects. Batch jobs are scheduled using scheduled flows.

Schedule Your Batch Jobs (Pilot)

Use scheduled flow to decide when a batch job must run and how frequently it runs. You can use a scheduled flow to run multiple batch jobs together.

Keep a Close Eye on Your Batch Jobs (Pilot)

Monitor the status and the health of a batch job run. Each time a job runs, a new record is created in Monitor Workflow Services. You can track the complete batch job run and its batch job parts. You can also view the list of records that the batch job failed to process.

Define Batch Jobs to Process Large Record Volumes (Pilot)

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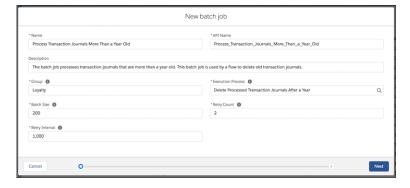
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Where: Batch Management is only available to participants of the Rebates pilot program. Check with your Salesforce representative for more information on which editions support Batch Management.

Who: Your Salesforce org admins can create batch jobs.

Why: Flows can process up to 250,000 records a day. Use batch jobs to process more than 250,000 records in manageable batches while staying within the platform limits. Multiple batch jobs can be scheduled together in a flow to process records across multiple objects that are part of the same business process.

How: From Setup, search and select **Batch Management**. Click **New**. Define a batch job, and select the business flow for the batch job to run. Click **Next**. Select the flow input variable that uniquely identifies each record. Select the object to process records for and the filter criteria. Click **Save**, and then **Activate**.



Schedule Your Batch Jobs (Pilot)

Use scheduled flow to decide when a batch job must run and how frequently it runs. You can use a scheduled flow to run multiple batch jobs together.

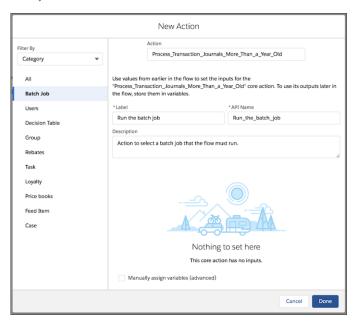


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How: In a scheduled flow, drag the Action element on to the canvas. Select the Category as **Batch Job**. Search for and select an active batch job.



Keep a Close Eye on Your Batch Jobs (Pilot)

Monitor the status and the health of a batch job run. Each time a job runs, a new record is created in Monitor Workflow Services. You can track the complete batch job run and its batch job parts. You can also view the list of records that the batch job failed to process.

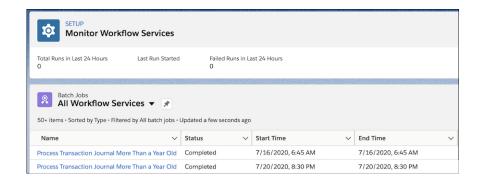


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Where: Batch Management is only available to participants of the Rebates pilot program. Check with your Salesforce representative for more information on which editions support Batch Management.

Who: Your Salesforce org admins can monitor batch job runs using Monitor Workflow Services.

How: In Setup, search and select Monitor Workflow Services. To view the details of a batch job run, click its record.



Data Processing Engine: Transform Data in Your Org in a Whole New Way (Pilot)

Extract data from standard objects and custom objects in your Salesforce org and transform it based on your business requirements. Then update or create records with the transformed data.



Note: We provide Data Processing Engine to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Data Processing Engine isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

IN THIS SECTION:

Transform Data with a Few Clicks (Pilot)

Data in your Salesforce org is stored across different objects. Use Data Processing Engine to bring all the data in one place and transform it based on your requirements. Start by creating an instance of Data Processing Engine. Then select data sources, define the various configurations, and choose whether you want to use the transformed data to create records or update existing records.

Run Your Data Processing Engine (Pilot)

Run an instance of Data Processing Engine to create or update records in your Salesforce org anytime or based on a schedule. You can run an instance after it's activated. Use a flow to define when and how frequently an instance of Data Processing Engine updates your data.

Track What Your Data Processing Engines Are Up To (Pilot)

Every time an instance of Data Processing Engine transforms and updates data, a tracking record is created in Monitor Workflow Services. Use the tracking record to view the details of the Data Processing Engine instance's run.

Transform Data with a Few Clicks (Pilot)

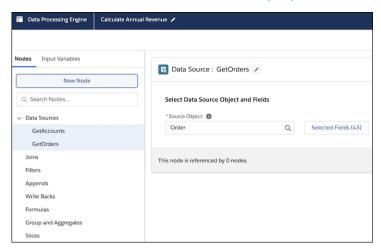
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Where: Data Processing Engine is only available to participants of the Rebates pilot program. Check with your Salesforce representative for more information on which editions support Data Processing Engine.

How: From Setup, search and select **Data Processing Engine**. Click **New**. Configure your Data Processing Engine and activate it.



Run Your Data Processing Engine (Pilot)

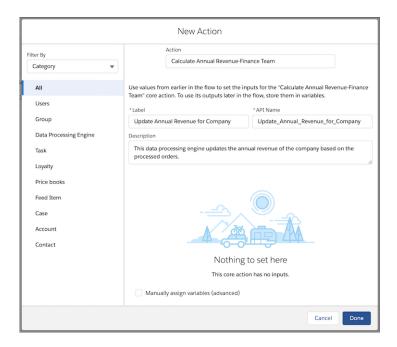
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How: In a flow, drag the **Action** element on to the canvas. Select the Category as **Data Processing Engine**. Search for and select an active Data Processing Engine.



Track What Your Data Processing Engines Are Up To (Pilot)

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Where: Data Processing Engine is only available to participants of the Rebates pilot program. Check with your Salesforce representative for more information on which editions support Data Processing Engine.

How: In Setup, search for and select **Monitor Workflow Services**. To view the details of a data processing engine run, open the corresponding record.

Emergency Response Management for Public Health

Emergency Response Management for Public Health has new compatibility requirements for your Salesforce orgs before they can process the push upgrade for the Winter '21 release.

IN THIS SECTION:

Winter '21 Upgrade Prerequisites

For any future upgrades to be successful, you must enable data protection and privacy details for your records.

Introducing Vaccine Management

Mobilize, manage, and scale your vaccination programs efficiently and effectively with the Salesforce platform.

Winter '21 Upgrade Prerequisites

For any future upgrades to be successful, you must enable data protection and privacy details for your records.

How:

- 1. From Setup, in the Quick Find box, enter Data Protection and Privacy, and then select Data Protection and Privacy.
- 2. Click Edit, select Make data protection details available in records, and then click Save.

Introducing Vaccine Management

Mobilize, manage, and scale your vaccination programs efficiently and effectively with the Salesforce platform.

Where: Vaccine Management capabilities apply to Lightning Experience in Enterprise and Unlimited editions.

Who: Depending on which Vaccine Management capabilities you'd like to build, additional product, feature, or user licenses may be required, such as the Health Cloud license provisioned in Salesforce.

Why: Vaccine Management helps you manage vaccination programs at unprecedented scale, and it offers you the flexibility and agility of an always on, ready-to-deploy platform.

How: Experienced partners or admins configure vaccine management capabilities based on Salesforce cross-cloud solutions to common vaccine management use cases.

Explore the power of multi-cloud solutions to create vaccine management capabilities that support the public sector, clinical vaccine administrators, pharmaceutical industries, and distributors.



Vaccine management capabilities show you how Salesforce products and features can be combined to expand your organization's capabilities. Vaccine management isn't a product or feature. Rather, it's a mix of capabilities that an experienced admin or partner can build on the Salesforce platform. To help guide you towards building vaccine management features, see the Salesforce suggested cross-cloud capabilities for solutions to common vaccine management use cases in Salesforce Help.

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Note: Work.com for Vaccines provides you with essential solutions designed to help manage vaccination programs. These also allow you to collect and use personal information about individuals, including health-related information, which is subject to various legal requirements in different jurisdictions. As with all Salesforce products, please consult with your own counsel to confirm that your intended use of these products meets your legal needs.

When developing solutions or implementations of Salesforce services for vaccination programs, we recommend you review Salesforce's Privacy and Ethical Use Principles Guiding Our COVID-19 Response.

SEE ALSO:

Salesforce Help: Configure Vaccine Management
Work.com for Vaccine Management

Analytics: Einstein Discovery Fast Start Templates, Sync Out for Snowflake, Einstein Discovery Automated Model Refresh

Analytics includes Reports & Dashboards, Einstein Analytics, and Einstein Discovery. Get Einstein Discovery going more quickly and easily with Fast Start Templates. Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. Automate some of the manual steps required to update your Einstein Discovery predictive models with scheduled model refresh.

Rights of ALBERT EINSTEIN are used with permission of The Hebrew University of Jerusalem. Represented exclusively by Greenlight.

IN THIS SECTION:

Introducing Our New Name for Einstein Analytics: Tableau CRM

Einstein Analytics has a new name. Say hello to Tableau CRM. Everything about how it works stays the same, just with that snazzy new name. When Tableau joined the Salesforce family, we brought together analytics capabilities of incredible depth and power. Tableau CRM is the part of that family which offers the best experience for native analytics inside Salesforce CRM products. Tableau CRM continues to combine Al and Bl, and Einstein Discovery continues to have tight integration with the platform. You'll see the old name in a few places as we work through the updates.

Reports and Dashboards: Auto Add Fields to Custom Report Types (Beta), Report Subscription Attachments

Automatically make new custom fields for a Salesforce object available to all the custom report types based on that object. Get report results in .csv or .xlsx format delivered to your inbox without having to sign in to Salesforce.

Einstein Analytics: Einstein Discovery Fast Start Templates, Sync Out for Snowflake, Einstein Discovery Automated Model Refresh

Get Einstein Discovery going more quickly and easily with Fast Start Templates. Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. Automate some of the manual steps required to update your Einstein Discovery predictive models with scheduled model refresh.

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Where: This change applies to Einstein Analytics in Lightning Experience, Salesforce Classic, and the Salesforce mobile app. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Reports and Dashboards: Auto Add Fields to Custom Report Types (Beta), Report Subscription Attachments

Automatically make new custom fields for a Salesforce object available to all the custom report types based on that object. Get report results in .csv or .xlsx format delivered to your inbox without having to sign in to Salesforce.

IN THIS SECTION:

Subscribe to Get Report Results Delivered by Email (Generally Available)

It's not always convenient to sign in to Salesforce just to view a report. So now you can get the latest report results delivered to your email inbox. As a report subscriber, choose whether to receive the report attachment in .xlsx or .csv format. Then open your email to view the results.

Auto Add Fields to Custom Report Types (Beta)

It's time-consuming to add new custom fields to your reports, especially when you have many custom report types. Now with Auto Add, custom fields that you add to a Salesforce object are added automatically to all the custom report types based on that object. When you create a report from the custom report type, all the custom fields are right there for you to add to your report.

Enable Enhanced Folder Sharing (Update)

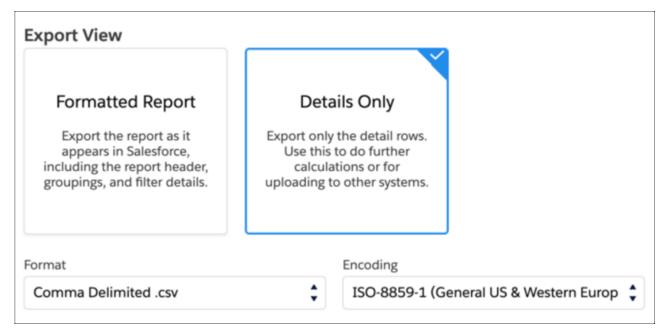
Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. In the Spring '21 release (subject to change to a later release), legacy folder sharing is retiring and enhanced folder sharing replaces it.

Subscribe to Get Report Results Delivered by Email (Generally Available)

It's not always convenient to sign in to Salesforce just to view a report. So now you can get the latest report results delivered to your email inbox. As a report subscriber, choose whether to receive the report attachment in .xlsx or .csv format. Then open your email to view the results.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To attach files to a report subscription, subscribe to the report. In the subscription setup, click **Attach File** and then select **Formatted Report** or **Details Only**. Each formatted report is delivered in .xlsx format and included in the body of the email. Each details-only report is attached to the message as a .csv file. For .csv attachments, you can select the encoding type.



That's all there is to it! The reports that you subscribed to are delivered to your inbox on schedule and in the selected format.

The attached report can include up to 15,000 rows and 30 columns. Additional rows are clipped. To view the entire report in Salesforce, click the report title in the formatted report email or sign in to Salesforce and search for the report.



SEE ALSO:

IdeaExchange: Schedule Reports as Attachments and add Adobe PDF, Excel Option

Auto Add Fields to Custom Report Types (Beta)

It's time-consuming to add new custom fields to your reports, especially when you have many custom report types. Now with Auto Add, custom fields that you add to a Salesforce object are added automatically to all the custom report types based on that object. When you create a report from the custom report type, all the custom fields are right there for you to add to your report.

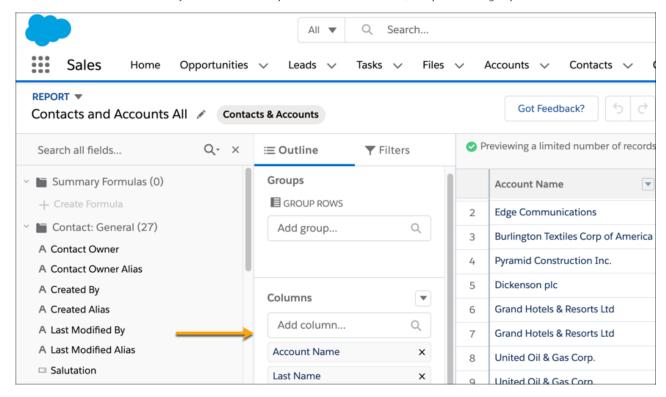
Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.



Note: As a beta feature, Report Subscription Attachments is a preview and isn't part of the "Services" under your primary subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Report Subscription Attachments in the IdeaExchange or in the Trailblazer Community.

How: From Setup, in the Quick Find box, enter *Reports and Dashboards Settings*, and then select **Reports and Dashboards Settings**. Select **Auto add new custom fields to custom report type layouts** and then click **Save**.

You can now add new custom fields to a report built from an existing custom report type from the Fields pane in the report builder. All custom fields for the Salesforce object are automatically included in the Fields list, and you can drag any of them to the Columns list.



SEE ALSO:

IdeaExchange: New Fields - add to Custom Report Types

Enable Enhanced Folder Sharing (Update)

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. In the Spring '21 release (subject to change to a later release), legacy folder sharing is retiring and enhanced folder sharing replaces it.

Where: This change applies to Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

When: Retirement is targeted for Spring '21 and is subject to change. For specific dates, go to https://status.salesforce.com/ and check information for your instance.

Why: After enabling enhanced folder sharing, your Salesforce users get view access to their report and dashboard folders, except for hidden folders, even if they previously had editor access. Hidden folders aren't shared with anyone, but users with the user permissions View Reports in Public Folders, Manage Reports in Public Folders, and their dashboard equivalents can view or manage hidden folders. To restore editor access to the user, it can be necessary to assign them new user permissions and then grant folder-level access.

Enhanced folder sharing features more customizable report and dashboard sharing via a familiar folder-based sharing model. Benefits include:

- Consistent sharing concepts across users, roles, and groups
- Sharing reports and dashboards with individual users
- Three access levels for each folder: view, edit, manage
- A symmetric set of user permissions for reports and dashboards

For example, in legacy folder sharing, Sally and Tim build a dashboard that's saved in a public folder with read and write access. Sally has the user permissions Manage Dashboards and View All Data, but Tim has only View All Data. After turning on enhanced folder sharing, Sally automatically receives the user permissions Manage Dashboards in Public Folders and Create Dashboard Folders, but Tim only receives the user permission View Dashboards in Public Folders. Before Tim can receive edit access to the folder, an admin must assign Tim the user permission Create and Customize Dashboards. Then, Sally can give Tim edit access to the dashboard folder, and they can continue to collaborate on the dashboard.

How: To get familiar with the new user permissions and folder access levels, Salesforce recommends that you turn on enhanced folder sharing in a sandbox or developer edition org first. Once you turn on enhanced folder sharing, you can't revert to legacy folder sharing.



Note: If your org was created in or after the Summer '13 release or later, you already have enhanced folder sharing and won't notice any change. No action is required.

Einstein Analytics: Einstein Discovery Fast Start Templates, Sync Out for Snowflake, Einstein Discovery Automated Model Refresh

Get Einstein Discovery going more quickly and easily with Fast Start Templates. Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. Automate some of the manual steps required to update your Einstein Discovery predictive models with scheduled model refresh.

IN THIS SECTION:

Analytics Data Integration: Sync Out for Snowflake, Data Prep Is Generally Available, Expanded Data Prep Formula Library

Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. The new visual recipe builder, Data Prep, is generally available with even more features. Add more robust calculated columns to your datasets.

Analytics Prebuilt Apps: Performance Insights on Revenue, Wealth Management Client Churn and Asset Growth, and Increased Mortgage Sales

Help sales teams gain performance insights with Revenue Operations dashboards. Predict and alleviate client churn and forecast the likelihood to grow account assets with the Wealth Management Analytics dashboards and Einstein Discovery stories. Increase mortgage sales by prioritizing which customer mortgage applications to focus on. Use predictions from the Einstein Discovery for Insurance Analytics app to retain customers. Use the fiscal calendar to filter data in your dashboards. Customize data access to sales managers so that they can only view data of users below them in the role hierarchy.

Analytics App Building: Table Column Control, Customized One-Click Actions, Live Connections to Snowflake (Generally Available), Local Time Zones (Beta)

Freeze table columns and collapse grouped columns. Customize actions in lenses and dashboards. Exploring data directly in Snowflake, without first loading it into Salesforce or requiring data preparation in datasets, is now generally available. View time-sensitive data in a non-GMT time zone (Beta). Conditionally format dashboard text. Create reusable dashboard components (Pilot). Create auto-install templates for managed packages.

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Customize user prompts for improvements. Use the new Predict function to get predictions in process automation formulas. Determine whether your data has a normal distribution with the new QQ plot.

Analytics for Everyone: Watchlist (Generally Available), Dynamic Lens Subscriptions (Generally Available), Image Security

Track metrics across multiple dashboards and monitor changes over time with Watchlist, which is now generally available and comes enabled in your Salesforce org. Get timely email updates with subscriptions, also now generally available, and subscribe to lenses as well as dashboard widgets. Use new image security controls to prevent sharing or downloading sensitive images of dashboards and lenses.

What's New In SAQL: Support for Custom Fiscal Year, Multi-Value Field Conversion to Strings

SAQL functionality continues to expand with custom fiscal year support, multi-value fields-to-string functionality, and additional string, math, and date functions.

Analytics Data Integration: Sync Out for Snowflake, Data Prep Is Generally Available, Expanded Data Prep Formula Library

Export your raw local Salesforce data to your Snowflake data lake without the need for a third-party ETL tool. The new visual recipe builder, Data Prep, is generally available with even more features. Add more robust calculated columns to your datasets.

IN THIS SECTION:

Avoid Stale Salesforce Data in Snowflake with Sync Out (Beta)

Fresh Salesforce data is vital if you maintain a central Snowflake data lake for processing, analysis, business automation, or storage. For example, give your shipping logistics team the freshest data by merging your account data from your system of record, Salesforce, with your ERP's shipping data in your data lake. Sync Out for Snowflake exports your raw local Salesforce data via Analytics to Snowflake using the Einstein Analytics connector for Snowflake. With Sync Out for Snowflake, keep your Salesforce data in Snowflake up to date using scheduled Data Sync without the need for a third-party ETL tool.

Write Your Einstein Analytics Datasets to Snowflake from Recipes (Generally Available)

The Snowflake Output connector lets you push your prepared data from Analytics into Snowflake when you use Data Prep recipes. You design powerful Data Prep recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With the Einstein Analytics connector for Snowflake, datasets are liberated from Analytics and written as a table for you without the need to rebuild relationships and business logic. This feature is now generally available.

Prepare Data with the Next Generation of Data Prep (Generally Available)

The latest version of Data Prep expands on the intuitive, visual interface that allows you to build recipes with clicks. Use the new graphical view of a recipe to see at a glance where data comes from, how it flows through the recipe, and where the results are written. To validate the recipe as you build, preview how raw data is transformed every step of the way. The new version of Data Prep is called Data Prep and the old version is called Data Prep Classic.

Build Calculated Formula Columns with More Functions in Data Prep

You can now use EA SQL functions with the Data Prep formula transformation to add calculated columns derived from other fields to your dataset. EA SQL is a collection of standard and custom functions for numeric, string, and date data. Previously, you were limited to 18 functions when you built formulas in Data Prep. Now there are more than 40 functions, including [case] to create buckets or flags based on field value, and [datediff()] to calculate the duration between dates.

Calculate Dates with Click-Not-Code Date and Time Transformations

Want to create Data Prep recipe fields based on date column calculations with clicks instead of manual queries? Check out the new predefined date formula transformations. With the Now transformation, you can insert a column with the current date and time in a specified format. Use Date Difference to calculate the duration between two selected date columns, like the time it takes for support to close cases by subtracting the created date from the closed date. And use the Add or Subtract Days or Months function to time travel to visit the dinosaurs. Just kidding, it lets you add or subtract days or months from a date column.

Quickly Calculate Statistics with Aggregate Functions

Calculate more aggregates in recipes using the new Aggregate node functions STDDEV (sample standard deviation), STDDEVP (population standard deviation), VAR (sample variance), and VARP (population variance). For example, a realty company calculates the average price of all homes sold in San Francisco in April 2020. To determine how spread out these home prices are, the realty company calculates the population standard deviation using the STDDEVP function.

View More Previews in Recipes

Each user can initiate up to 4,000 previews an hour in Data Prep. Previously, the maximum previews per hour per user was 2,000. Each time you click a node or transformation to preview its results, the preview count increases.

Manage Row-Level Security for Data Prep Recipes

Sharing inheritance is now available for datasets created from Data Prep recipes. Sharing inheritance increases access accuracy and reduces the need for complicated security predicates for most objects and situations. For example, a quarterly pipeline dashboard automatically shows each rep only their own opportunities, and their managers can see opportunities of the team, following the opportunity sharing rules. Previously, sharing inheritance was only available for datasets created by a dataflow.

Edit a Dataset with One Click from Data Manager

Clicking a dataset link in the Data tab of Data Manager now opens the dataset properties page, where you can edit the dataset. Previously, the link created a recipe with the dataset as the source.

Monitor and Update Auto-Installed Analytics Apps from Setup

Easily see which Analytics apps are automatically installed in your Salesforce org with the new Auto-Installed Apps page. You can update the app, view logs on the app status, delete apps no longer in use, and monitor auto-install requests.

Avoid Stale Salesforce Data in Snowflake with Sync Out (Beta)

Fresh Salesforce data is vital if you maintain a central Snowflake data lake for processing, analysis, business automation, or storage. For example, give your shipping logistics team the freshest data by merging your account data from your system of record, Salesforce, with your ERP's shipping data in your data lake. Sync Out for Snowflake exports your raw local Salesforce data via Analytics to Snowflake using the Einstein Analytics connector for Snowflake. With Sync Out for Snowflake, keep your Salesforce data in Snowflake up to date using scheduled Data Sync without the need for a third-party ETL tool.

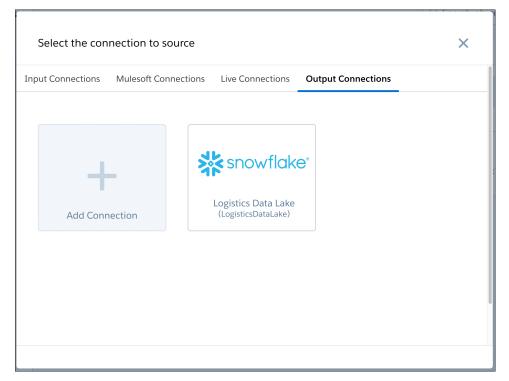
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



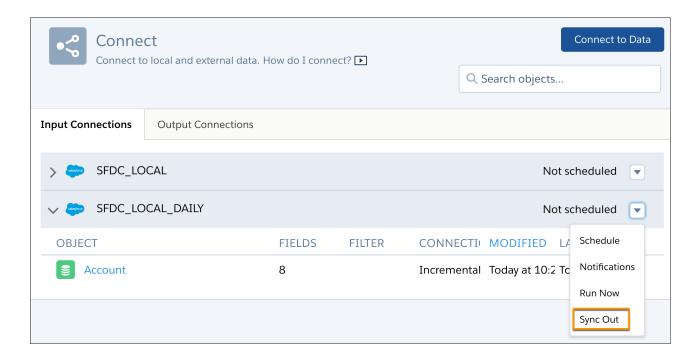
Note: As a beta feature, Sync Out for Snowflake is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Sync Out for Snowflake in the Einstein Analytics Pilot and Beta Connectors group in the Trailblazer Community.

Why: You can use a Data Prep recipe output node to push data to Snowflake, but this augmentation adds a layer of processing. With Sync Out for Snowflake, you can push the data in the same condition as Analytics received it from Salesforce, with no additional processing time.

How: Contact your Salesforce account representative to enable Sync Out for Snowflake. Turn on Sync Out for Snowflake in Analytics Setup. On the Connect tab of the Data Manager, click Connect to Data. Add a connection on the Output Connections tab and configure it with your Snowflake account information.



Back on the Connect tab, find the local Salesforce connection with data you want to export to Snowflake. For our example, this local connection includes the account object. Select the down arrow () next to the connection and click **Sync Out**.



Sync Out runs as the data sync completes for each local object. For our example, after Data Sync pulls data from the account object into Analytics, Sync Out would then push the same account data to Snowflake.

SEE ALSO:

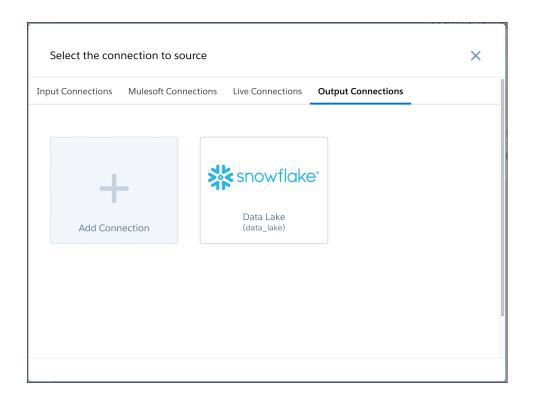
Salesforce Help: Snowflake Output Connection

Write Your Einstein Analytics Datasets to Snowflake from Recipes (Generally Available)

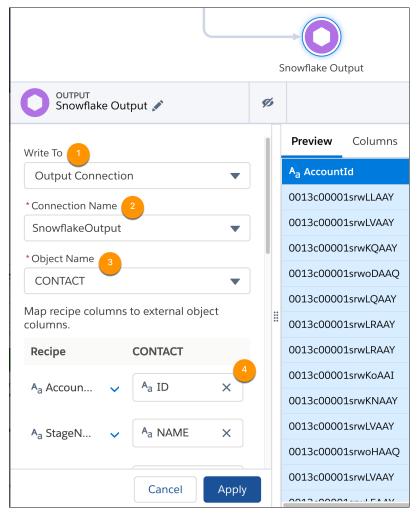
The Snowflake Output connector lets you push your prepared data from Analytics into Snowflake when you use Data Prep recipes. You design powerful Data Prep recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With the Einstein Analytics connector for Snowflake, datasets are liberated from Analytics and written as a table for you without the need to rebuild relationships and business logic. This feature is now generally available.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: On the Connect tab of the Data Manager, click Connect to Data. Add a connection on the Output Connections tab and configure it with your Snowflake account information.



Build your recipe with Data Prep. In an Output node, select to write to the Output Connection (1). Choose the Snowflake connection to push data to (2) and the Snowflake object that receives the data (3). Map recipe columns to their equivalent external object columns (4).



Save the recipe. When the recipe runs, Analytics writes the outcome to Snowflake.

SEE ALSO:

Salesforce Help: Snowflake Output Connection

Prepare Data with the Next Generation of Data Prep (Generally Available)

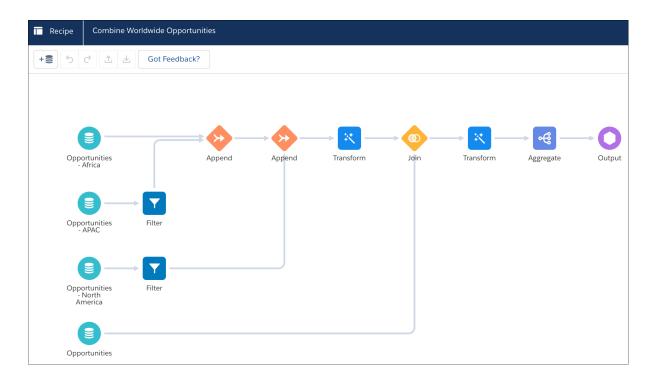
The latest version of Data Prep expands on the intuitive, visual interface that allows you to build recipes with clicks. Use the new graphical view of a recipe to see at a glance where data comes from, how it flows through the recipe, and where the results are written. To validate the recipe as you build, preview how raw data is transformed every step of the way. The new version of Data Prep is called Data Prep and the old version is called Data Prep Classic.

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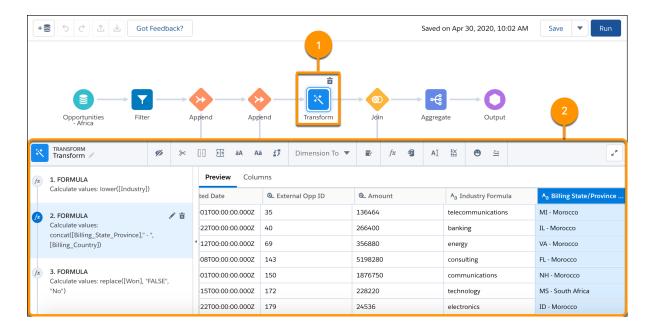
Who: To use Data Prep, you must be assigned the Edit Analytics Dataflows or Edit Dataset Recipes user permission.

Why: Data Prep graphs are easy to read, even with lots of transformations. *Graph* refers to the graphical representation of the recipe. Unlike a dataflow graph, which can be a bit cluttered, a recipe graph doesn't show every transformation. It shows only inputs (source data), appends, aggregates, filters, joins, and the outputs (where the data is written). It also shows transforms, which are groups of

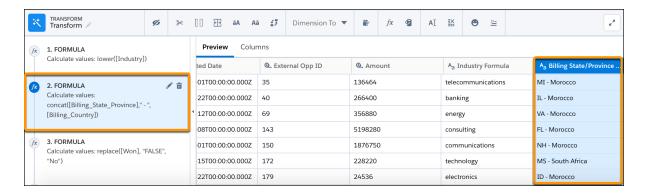
transformations that change the raw data and convert column types. By hiding lower-level data changes, the graph provides an easier-to-read view of the flow of data. Each object shown in the graph is called a node. A recipe can have multiple Input, Aggregate, Append, Filter, Join, Transform, and Output nodes.



Although the graph doesn't show individual data transformations, you can select a Transform node (1) in the graph to see its transformations in the details area (2).



As in Data Prep Classic, you can select a transformation step in the left panel to preview the results of that transformation in the Preview tab. And you can select any node in the graph to preview the results of that node.



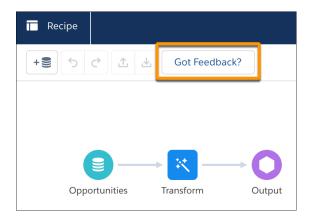
How: To create a Data Prep recipe, click **Create Recipe** in the Recipes tab of Data Manager.



Consider the following guidelines when using Data Prep:

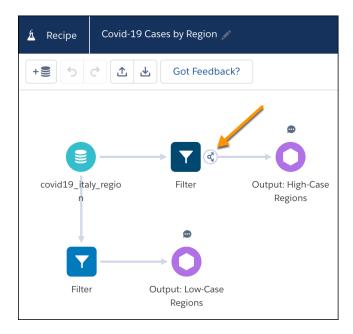
- You can't open recipes created with Data Prep in Data Prep Classic.
- When you open a recipe built with Data Prep Classic, it's upgraded to the new Data Prep version and opens in Data Prep.
- You can no longer create a recipe using Data Prep Classic.

Want to share some feedback about the latest version of Data Prep? Click **Got Feedback** in Data Prep to tell us what's on your mind. We're listening.

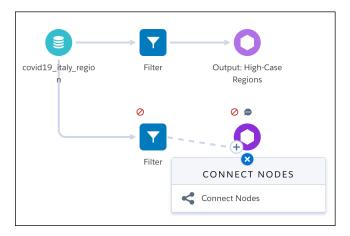


If you tried out our beta version last release, check out some of the new features available this release.

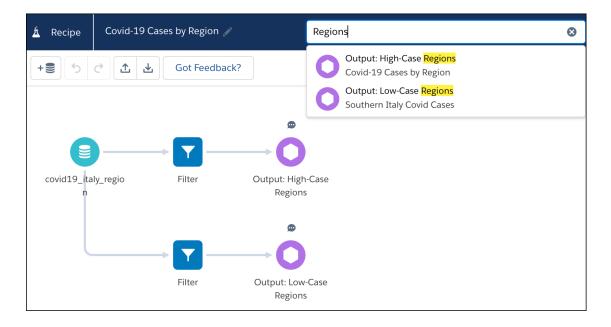
- Run column profiling on the sample data to get key stats about columns, such as the frequency of values and percent of columns with missing values.
- Branch a recipe graph to write to multiple datasets. To branch a recipe at a node, hover over the node and then click the branch icon ().



• Drag to connect nodes in a recipe graph. To connect nodes, drag + to the second node, and drop it on the Connect Nodes option that appears.



- Write formulas using the improved editor with syntax highlighting and autocomplete.
- Perform date calculations using new date functions Date Difference, Now, and Add or Subtract Dates. For more information, see
 Calculate Dates with Click-Not-Code Date and Time Transformations.
- Build more formulas with the new EA SQL functions, including the Case function. See Build Calculated Formula Columns with More Functions in Data Prep.
- Flatten hierarchies with the new Flatten transformation.
- Perform multi-value lookups and create multi-value fields with the Join node.
- Rename recipes, set node names, and enter node descriptions to help others understand their purpose.
- Search nodes in the graph by name, type, or metadata to quickly locate them. To locate a node, enter the search string, and then select the node.



Preview up to 5,000 rows instead of 100.

Manually update your recipe JSON using the download ([™]) and upload ([™]) buttons.

SEE ALSO:

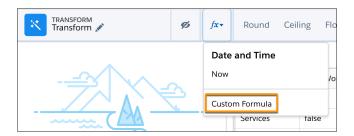
Salesforce Help: Clean, Transform, and Load Data with Data Prep (can be outdated or unavailable during release preview)

Build Calculated Formula Columns with More Functions in Data Prep

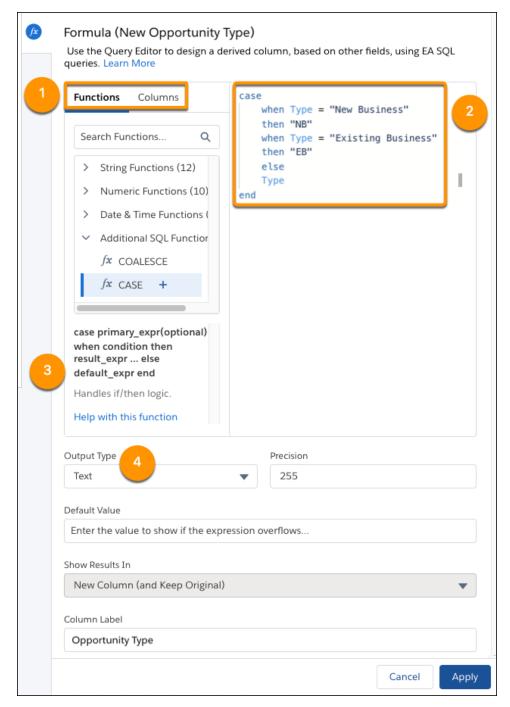
You can now use EA SQL functions with the Data Prep formula transformation to add calculated columns derived from other fields to your dataset. EA SQL is a collection of standard and custom functions for numeric, string, and date data. Previously, you were limited to 18 functions when you built formulas in Data Prep. Now there are more than 40 functions, including [case] to create buckets or flags based on field value, and [datediff()] to calculate the duration between dates.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To add a formula transformation, click the Formula button (f^{**}) and select **Custom Formula**.



Create your own calculated columns with the formula editor using function and column selector (1), auto-complete (2), built-in EA SQL function guidance (3), and output type selection (4).



SEE ALSO:

Salesforce Help: Formula Transformation: Create a Calculated Column Based on an Expression

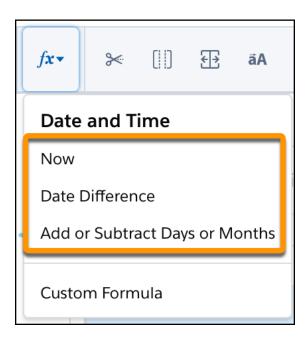
nc Out for Snowflake, Einstein Discovery Automated Model Refresh

Calculate Dates with Click-Not-Code Date and Time Transformations

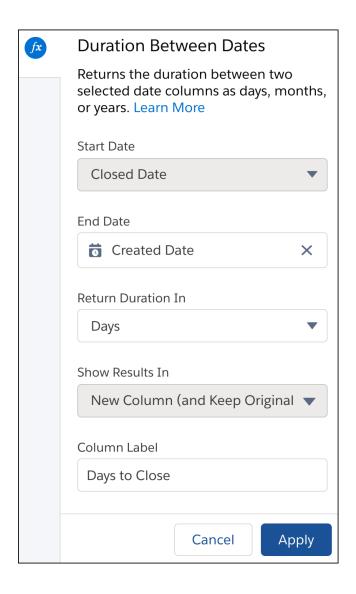
Want to create Data Prep recipe fields based on date column calculations with clicks instead of manual queries? Check out the new predefined date formula transformations. With the Now transformation, you can insert a column with the current date and time in a specified format. Use Date Difference to calculate the duration between two selected date columns, like the time it takes for support to close cases by subtracting the created date from the closed date. And use the Add or Subtract Days or Months function to time travel to visit the dinosaurs. Just kidding, it lets you add or subtract days or months from a date column.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To add a date formula transformation, select the Formula button (fx) and choose the transformation from the list.



Configure the transformation's fields. For example, to calculate age of closed cases, use the Date Difference transformation with the Closed Date and Created Date fields.

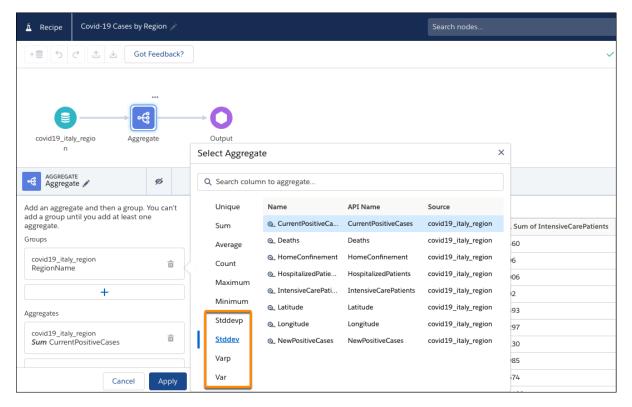


Quickly Calculate Statistics with Aggregate Functions

Calculate more aggregates in recipes using the new Aggregate node functions STDDEV (sample standard deviation), STDDEVP (population standard deviation), VAR (sample variance), and VARP (population variance). For example, a realty company calculates the average price of all homes sold in San Francisco in April 2020. To determine how spread out these home prices are, the realty company calculates the population standard deviation using the STDDEVP function.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: The new functions appear when you add an aggregate to the Aggregate node.



View More Previews in Recipes

Each user can initiate up to 4,000 previews an hour in Data Prep. Previously, the maximum previews per hour per user was 2,000. Each time you click a node or transformation to preview its results, the preview count increases.

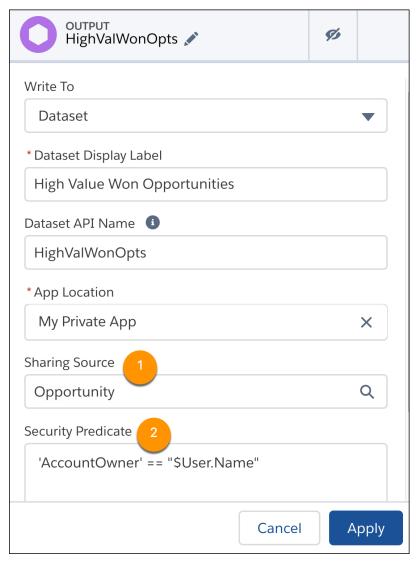
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Manage Row-Level Security for Data Prep Recipes

Sharing inheritance is now available for datasets created from Data Prep recipes. Sharing inheritance increases accuracy and reduces the need for complicated security predicates for most objects and situations. For example, a quarterly pipeline dashboard automatically shows each rep only their own opportunities, and their managers can see opportunities of the team, following the opportunity sharing rules. Previously, sharing inheritance was only available for datasets created by a dataflow.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Determine if sharing inheritance is appropriate for your org with these questions, then turn on sharing inheritance from the Analytics section in Setup. Enable sharing inheritance for each synced object to inherit sharing settings from. Sharing inheritance automatically covers row-level security for eligible users and objects from Data Prep recipes. In a Data Prep recipe output node, choose an eligible object as the sharing source (1). Optionally, set the security predicate (2) as a backup for sharing inheritance. In this example, the Opportunity object's sharing settings provide each user's data visibility. If sharing inheritance isn't available, or a user isn't covered, the backup security predicate specifies that users can only see their own records.



SEE ALSO:

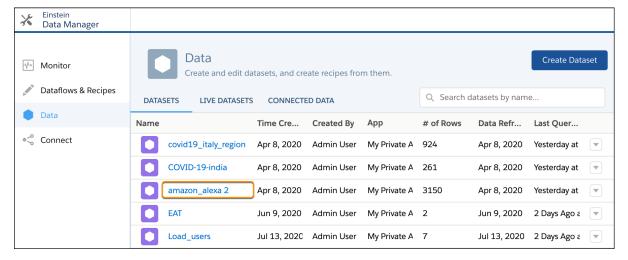
Salesforce Help: Add Row-Level Security by Inheriting Sharing Rules

Edit a Dataset with One Click from Data Manager

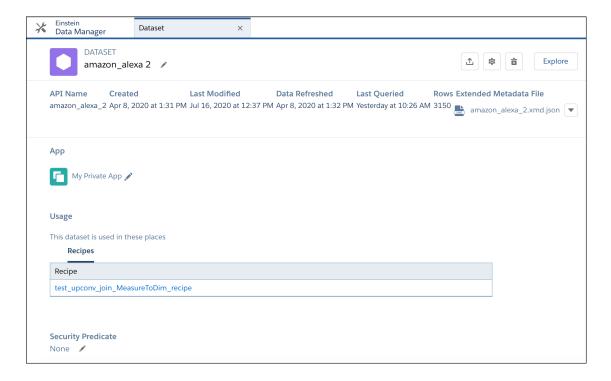
Clicking a dataset link in the Data tab of Data Manager now opens the dataset properties page, where you can edit the dataset. Previously, the link created a recipe with the dataset as the source.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Click a dataset link on the Data tab.



You can now view the dataset properties and edit the dataset.



Monitor and Update Auto-Installed Analytics Apps from Setup

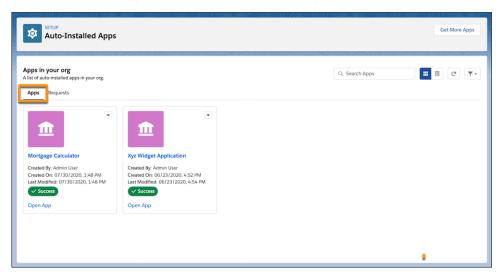
Easily see which Analytics apps are automatically installed in your Salesforce org with the new Auto-Installed Apps page. You can update the app, view logs on the app status, delete apps no longer in use, and monitor auto-install requests.

Why: The auto-install framework for templated Analytics apps requires a simple user interface to present actions and debugging to admins. The Auto-Installed App page gives you easy access to information on what apps have been auto-installed and which auto-install requests are running, completed, or failed. Apps can be updated or deleted and requests can be canceled.

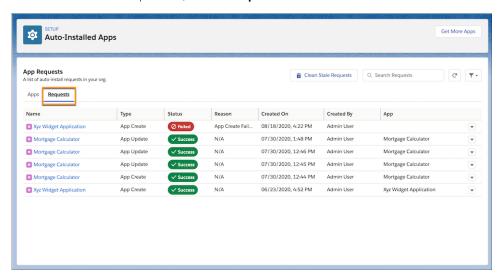
How: From Setup, in the Quick Find box enter Auto-Installed Apps, and then select Auto-Installed Apps.

Use the tabs to view either the list of installed Analytics apps or the list of received auto-install requests. The lists show templated apps with the type app or embedded app that are auto-installed.

The default view is the Apps tab with the list of auto-installed apps.



To view the auto-install requests list, click the **Requests** tab.



Each app and auto-install request has a status, which you can update by clicking the refresh icon.



You can perform these actions on completed auto-installed Analytics apps and auto-install requests.

- Open opens the auto-install details for the app
- Delete Application Deletes the app using an auto-install request of type WaveAppDelete
- View Log Displays the current auto-install request log for the app
- Try Again Runs the last auto-install request for the app again: WaveAppCreate or WaveAppDelete





You can perform these actions on in-progress auto-installed Analytics apps and auto-install requests.

- Open opens the auto-install details for the app
- Cancel Request Cancels the current auto install request using an auto-install request of type WaveAppCancel

Deleted auto-installed Analytics apps don't appear on the Apps tab, but auto-install requests for deleted apps remain on the Requests tab. These requests don't have the Delete App action.

Analytics Prebuilt Apps: Performance Insights on Revenue, Wealth Management Client Churn and Asset Growth, and Increased Mortgage Sales

Help sales teams gain performance insights with Revenue Operations dashboards. Predict and alleviate client churn and forecast the likelihood to grow account assets with the Wealth Management Analytics dashboards and Einstein Discovery stories. Increase mortgage sales by prioritizing which customer mortgage applications to focus on. Use predictions from the Einstein Discovery for Insurance Analytics app to retain customers. Use the fiscal calendar to filter data in your dashboards. Customize data access to sales managers so that they can only view data of users below them in the role hierarchy.

IN THIS SECTION:

Improve Insights into Sales Performance with the Revenue Operations Analytics App

Let sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue with Revenue Operations Analytics. The Revenue Operations Analytics app assists sales managers and teams in gauging their team performance, revenue forecasting, forecast tracking, and deals overview. It delivers forecasting analytics with a better user experience, better pipeline visibility, and easier deal inspection and forecasting with the use of predictive analytics.

SEE ALSO:

Predict Client Churn Risk for Wealth Management

Predict the Likelihood to Add Assets for Wealth Management

Analytics for Mortgage: Increase Sales with the Analytics for Mortgage App

Maximize Policy Renewals with Einstein Discovery for Insurance Analytics

Filter Data by Fiscal Calendar

Customize Data Access for Sales Managers

Improve Insights into Sales Performance with the Revenue Operations Analytics App

Let sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue with Revenue Operations Analytics. The Revenue Operations Analytics app assists sales managers and teams in gauging their team performance, revenue forecasting, forecast tracking, and deals overview. It delivers forecasting analytics with a better user experience, better pipeline visibility, and easier deal inspection and forecasting with the use of predictive analytics.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Analytics Studio, click **Create** and select **App**. Find and select **Revenue Operations Analytics**. Then follow the instructions in the wizard to create your app.

Analytics App Building: Table Column Control, Customized One-Click Actions, Live Connections to Snowflake (Generally Available), Local Time Zones (Beta)

Freeze table columns and collapse grouped columns. Customize actions in lenses and dashboards. Exploring data directly in Snowflake, without first loading it into Salesforce or requiring data preparation in datasets, is now generally available. View time-sensitive data in a non-GMT time zone (Beta). Conditionally format dashboard text. Create reusable dashboard components (Pilot). Create auto-install templates for managed packages.

IN THIS SECTION:

Freeze Some Table Columns, Scroll Through the Rest

You're no longer restricted to having just a compare table's group columns locked in place. Choose which columns stay visible while you scroll through the remaining data. You can now freeze up to five columns in a compare table or values table in explorer and dashboard designer. Also, in dashboard preview mode, you can freeze as many columns as you need.

Expand or Collapse Grouped Columns Faster

Quickly view data rolled up to the next hierarchy level in grouped columns with the expand and collapse layout option for compare tables. Reviewing row details for records within each group in the hierarchy is also now just a click away. Previously, you edited SAQL queries or manually hid and deleted columns for these data views.

Customize One-Click Actions for Dimensions

Take advantage of the new Actions menu in the explorer to set how one-click actions behave on a table's dataset fields in lenses and dashboards. For more efficiency, users can select the record action you want to invoke for all records in a dimension column. Or, for greater flexibility, they can choose to view all available one-click actions when you click records in a specific column.

Gain Insights on Data Directly in Snowflake (Generally Available)

Run explorations on your data in the Snowflake data platform without loading data into Salesforce or requiring data preparation. After you set up a live connection to Snowflake, you can run queries on Snowflake data associated with the connection in real time. With Einstein Analytics Direct for Snowflake, you can even build dashboard charts and tables based on the queries that you run on this data.

Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Beta)

Want to break free from GMT and view time-sensitive dashboard data in another time zone? We've got you covered. Now you can view dashboard data in the time zone that matters most to your business. In case you didn't know, dashboard data is converted to the GMT time zone. That means when your California-based support team creates a case late on Wednesday (in California time), the creation date could suddenly change to early Thursday in their customer support dashboard. With Single Custom Time Zone, you can ensure that time-sensitive data is more precise and relevant to your global audience.

Emphasize Key Metrics in Dashboard Text with Conditional Formatting

Now in addition to numbers, tables, and charts, you can apply conditional formatting to your dashboard text. Conditional formatting is an easy way to make important insights pop when you assign colors based on specific values. For example, change quarterly sales numbers to green when they go above your target.

Protect Data in Embedded Dashboards with Locked or Hidden Filters

When filters on embedded dashboards aren't locked or hidden, users can modify or delete both external and global filters, exposing more data. The new lock and hide options for filters are an easy way to configure embedded dashboards so users see only the data that you want them to see. And, with the updated dashboard reset action, you can now return an embedded dashboard to its initial embedded state.

Save Time Creating and Managing Dashboards with Reusable Dashboard Components (Pilot)

Want to easily reuse the same charts, tables, filters, text, and more in multiple dashboards? Want to manage everything in one place? Meet dashboard components. They're a new type of dashboard widget that can contain other widgets and pages. Best of all, they're a great way to fast-track how you create and manage dashboards with clicks instead of code.

Add Faceting to More Data in Dashboards

Sometimes, you want to build interactivity on data that resides outside Einstein Analytics. Now, in addition to Analytics dataset fields, you can facet on fields in Salesforce objects and live datasets. After creating data source connections to the external object fields in a dashboard query, you can enable faceting on them in queries and widgets.

Develop Analytics Templates for Auto Installation

Minimize the user interaction required to manually create Analytics apps from the template wizard in Analytics Studio by developing templates that use the auto-install framework. The framework installs templated Analytics app in orgs via managed packages automatically. The dashboards created for these applications can be embedded in Lightning Experience pages, allowing users to interact with Einstein Analytics directly in Salesforce pages.

View Einstein Analytics Data Downloads in Your Event Log Files

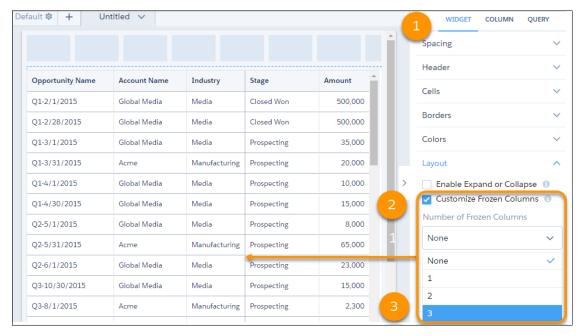
For tracking, security, or compliance, you can now access logs of data downloads from Einstein Analytics. The download logs exposed in Event Monitoring include session id, user id, asset type and id, dataset id, Salesforce user type, download format (PNG, EXCEL, or CSV), and number of rows downloaded. Use the download log data to create your own datasets and dashboards.

Freeze Some Table Columns, Scroll Through the Rest

You're no longer restricted to having just a compare table's group columns locked in place. Choose which columns stay visible while you scroll through the remaining data. You can now freeze up to five columns in a compare table or values table in explorer and dashboard designer. Also, in dashboard preview mode, you can freeze as many columns as you need.

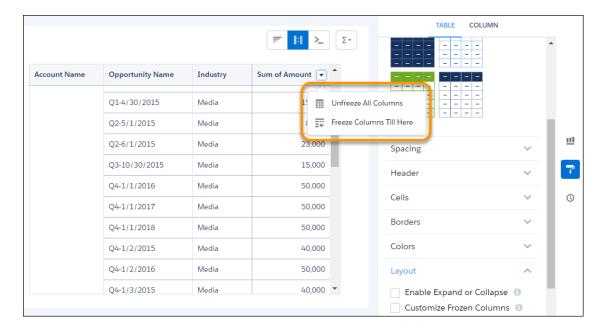
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In the dashboard designer, go to the widget properties panel (1). Select **Customize Frozen Columns** in the Layout section (2) and set the number of table columns to freeze (3). A dark gray line indicates the end of the freeze pane.



To access this setting from the explorer, go to the Layout section in the table properties panel.

For the shortcut menu to freeze and unfreeze columns, or to access this feature in dashboard preview mode, hover over the header of the last column you want to freeze. In the dropdown menu, select **Freeze Columns Till Here**.



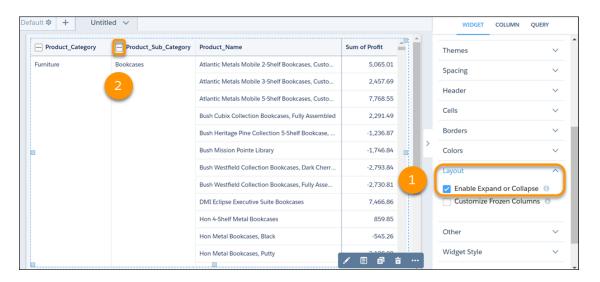
Expand or Collapse Grouped Columns Faster

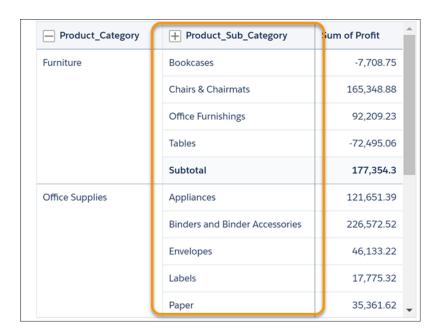
Quickly view data rolled up to the next hierarchy level in grouped columns with the expand and collapse layout option for compare tables. Reviewing row details for records within each group in the hierarchy is also now just a click away. Previously, you edited SAQL queries or manually hid and deleted columns for these data views.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Let's say you're analyzing your business sales report. In the compare table grouped by product category, subcategory and name, rolling up the products to its subcategories makes it easier to determine your top-selling subcategories.

How: In the dashboard designer's widget properties panel, select **Enable Expand or Collapse** in the Layout section (1). In this example, to roll up product records to product subcategory, click next to Product Subcategory (2).





To access this setting from the explorer, go to the Layout section in the table properties panel.

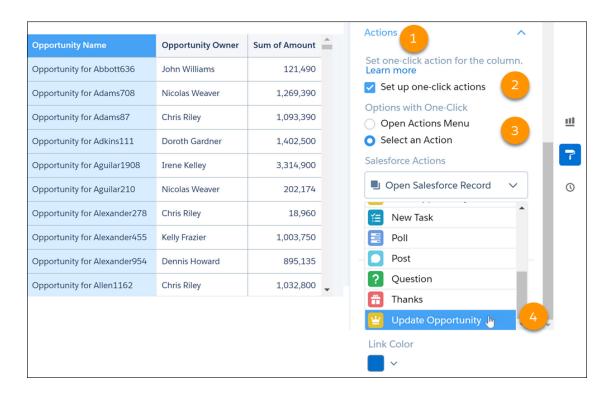
Customize One-Click Actions for Dimensions

Take advantage of the new Actions menu in the explorer to set how one-click actions behave on a table's dataset fields in lenses and dashboards. For more efficiency, users can select the record action you want to invoke for all records in a dimension column. Or, for greater flexibility, they can choose to view all available one-click actions when you click records in a specific column.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Imagine that you want to update opportunity records when you click the Opportunity Name field in the Opportunities dataset. After your Salesforce admin has configured actions for this field, open the Opportunities dataset.

With Opportunity Name selected in the table mode, in the Column Properties panel, scroll to the Actions section (1). Select **Set up one-click actions** (2). Enable **Select an Action** (3). Alternatively, to view all available actions when you click an opportunity name, select **Open Actions Menu**. From the Salesforce Actions list, select **Update Opportunity** (4). Optionally set a hyperlink color for the Opportunity Name field.



Gain Insights on Data Directly in Snowflake (Generally Available)

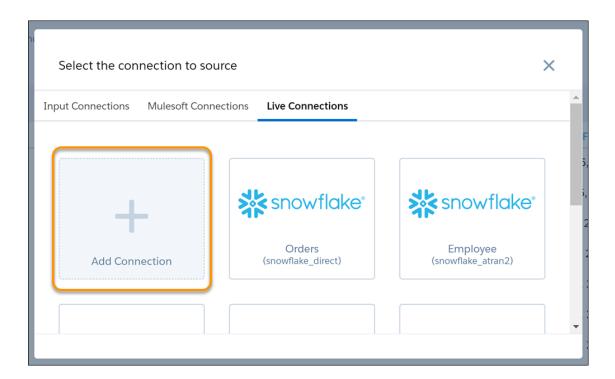
Run explorations on your data in the Snowflake data platform without loading data into Salesforce or requiring data preparation. After you set up a live connection to Snowflake, you can run queries on Snowflake data associated with the connection in real time. With Einstein Analytics Direct for Snowflake, you can even build dashboard charts and tables based on the queries that you run on this data.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: By default, Enable Einstein Analytics Direct Data for external data sources is turned on in the Analytics Settings page.

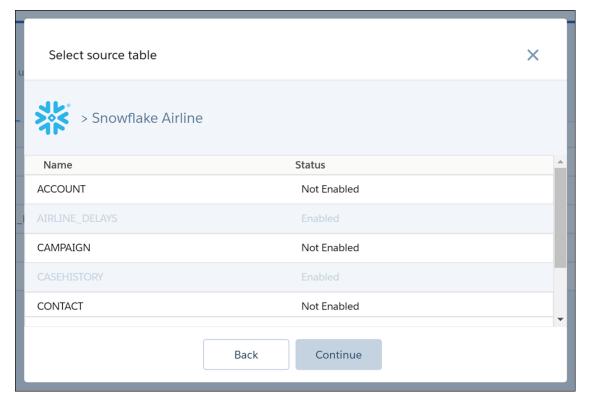
1. On the Connect tab of the Einstein Analytics data manager, click **Connect to Data**.

2. Click **Add Connection** on the Live Connections tab and enter its settings.



When done, click **Save** or **Save and Create Dataset**.

- Note: When creating connections to Snowflake, we recommend using a Snowflake user account with read-only access to maintain data security.
- **3.** In the data manager, click the **Data** tab.
- **4.** On the Live Datasets tab, click, **Create Dataset**. Select the connection and enable a Snowflake source table that is available with the connection.



- **5.** Name the live dataset and assign it to an Analytics app. Use the app to control which Salesforce users, roles, and groups have access to explore Snowflake data with the connection. When done, click **Create Live Dataset**.
- **6.** To begin exploring, click the live dataset from the Datasets tab in Analytics Studio.

Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Beta)

Want to break free from GMT and view time-sensitive dashboard data in another time zone? We've got you covered. Now you can view dashboard data in the time zone that matters most to your business. In case you didn't know, dashboard data is converted to the GMT time zone. That means when your California-based support team creates a case late on Wednesday (in California time), the creation date could suddenly change to early Thursday in their customer support dashboard. With Single Custom Time Zone, you can ensure that time-sensitive data is more precise and relevant to your global audience.



Note: As a beta feature, Single Custom Time Zone is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Single Custom Time Zone in the Trailblazer Community.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Contact your Salesforce account representative to enable Single Custom Time Zone. Turn on Single Custom Time Zone in Analytics Setup and select which time zone to use.

(1) Important: This feature can't be disabled after you enable it. We recommend that you thoroughly test Single Custom Time Zone in a sandbox org before you enable it in your production org.

Keep these considerations in mind when using Single Custom Time Zone.

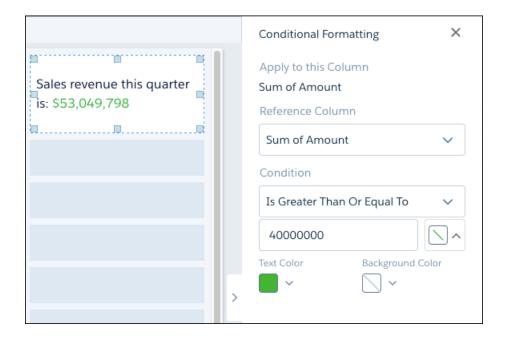
- A time zone is defined at the org level.
- All datasets must be refreshed after enabling Single Custom Time Zone and specifying your default org time zone.
- Existing dashboards remain in the GMT time zone.
- After enabling Single Custom Time Zone, new dashboards can use non-GMT time zones.

Emphasize Key Metrics in Dashboard Text with Conditional Formatting

Now in addition to numbers, tables, and charts, you can apply conditional formatting to your dashboard text. Conditional formatting is an easy way to make important insights pop when you assign colors based on specific values. For example, change quarterly sales numbers to green when they go above your target.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Apply conditional formatting to your dynamic text in the widget properties panel in the dashboard designer.



Keep in mind that conditional formatting rules applied to a query also apply to text widgets that use the same query data. However, you can create rules or edit existing rules when you create or edit dashboard text.

SEE ALSO:

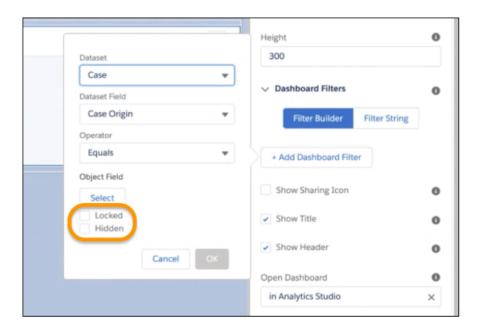
Salesforce Help: Automatically Highlight Data with Conditional Formatting (can be outdated or unavailable during release preview)

Protect Data in Embedded Dashboards with Locked or Hidden Filters

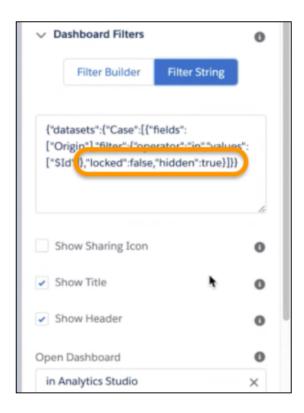
When filters on embedded dashboards aren't locked or hidden, users can modify or delete both external and global filters, exposing more data. The new lock and hide options for filters are an easy way to configure embedded dashboards so users see only the data that you want them to see. And, with the updated dashboard reset action, you can now return an embedded dashboard to its initial embedded state.

Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Set the Locked or Hidden option in the Filter Builder in the Lightning App Builder.

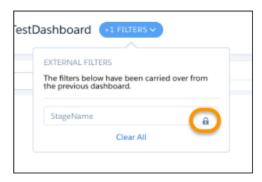


Or add the options in the filter's JSON with a Boolean value. For example, "locked": false, "hidden": true.



Note: Locked and hidden options can only be used for filters and not for selections.

With the **Locked** option, the Filters menu appears in the embedded dashboard header, but users can't modify or delete the filters.



With the **Hidden** option, the Filters menu doesn't appear in the embedded dashboard header.

When setting up locked or hidden filters for embedded dashboards, keep in mind the following considerations.

- Locked and hidden filters are applied on the dashboard. If a filter makes a field visible, users see the field even when you've restricted access to filters with one of these options.
- Locked and Hidden options aren't automatically applied in linked dashboards or lens explorations. The options are applied only on the dashboard where specified.

• Locked and Hidden options are applied to a dashboard when embedded or when opened in Einstein Analytics Studio or Analytics tab.

SEE ALSO:

IdeaExchange: Reset filters keeps embedded dashboard filters when saved views is enabled

Save Time Creating and Managing Dashboards with Reusable Dashboard Components (Pilot)

Want to easily reuse the same charts, tables, filters, text, and more in multiple dashboards? Want to manage everything in one place? Meet dashboard components. They're a new type of dashboard widget that can contain other widgets and pages. Best of all, they're a great way to fast-track how you create and manage dashboards with clicks instead of code.

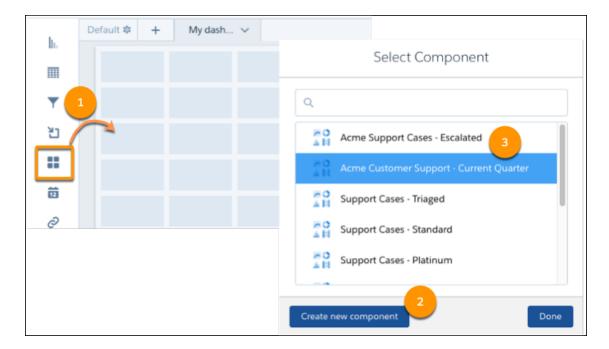


Note: We provide Dashboard Components to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Dashboard Components in the Trailblazer Community.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Contact your Salesforce account representative to enable dashboard components in your org.

To get started, drop a dashboard component onto a dashboard (1). Create a new component (2) or use an existing one (3).



Add pages, charts, text, filters, and more to your component the same way you create a dashboard. When you save a component, you can use it in other dashboards as much as you want.



Note: These features aren't supported in dashboard components.

Layouts

- Saved views
- Annotations
- Notifications
- Subscriptions
- Widget actions
- Packaging
- Links to dashboard components
- Data source linking in a dashboard component

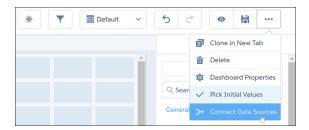
Add Faceting to More Data in Dashboards

Sometimes, you want to build interactivity on data that resides outside Einstein Analytics. Now, in addition to Analytics dataset fields, you can facet on fields in Salesforce objects and live datasets. After creating data source connections to the external object fields in a dashboard query, you can enable faceting on them in queries and widgets.

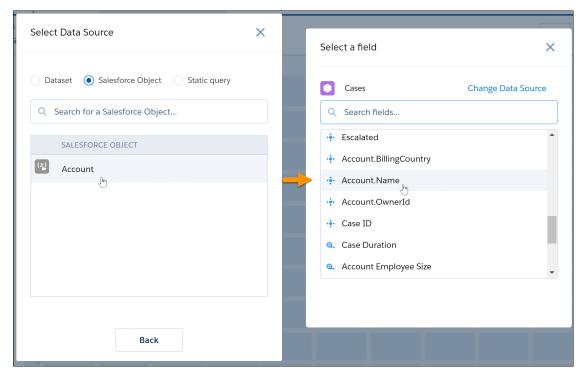
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

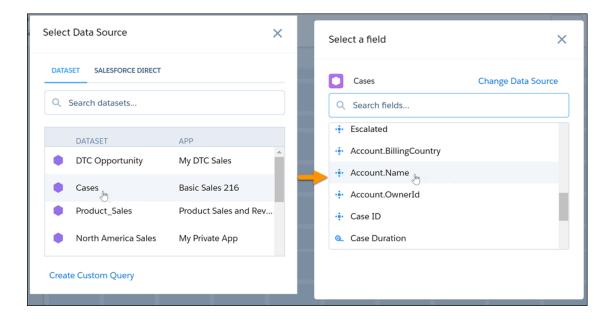
How: Suppose that you want to review the number of cases by account in a dashboard. Now you can facet a query from the Salesforce Account object to the Cases dataset after connecting the Account Name fields in these data sources.

- 1. In the dashboard designer, create a query on the Salesforce Account object. Then set the Bar Length to Sum of Annual Revenue and the Bars field to Account Name.
- 2. Create another query on the Cases dataset. Rename Count of Rows to Number of Cases and set the Bars field to Account Name.
- **3.** To connect the two queries, click and select **Connect Data Sources**.



- **4.** Click **New Connection** and enter a name for the connection.
- **5.** Select the Account object as Data Source 1 and the Cases dataset as Data Source 2. For both these data sources, choose Account Name as the field to define the connection and match the records between them.





6. Save your changes when done.

To view the interactivity between the queries, drag them to the dashboard and select a record in one query. Both queries in the dashboard now facet on the Account name field.

Develop Analytics Templates for Auto Installation

Minimize the user interaction required to manually create Analytics apps from the template wizard in Analytics Studio by developing templates that use the auto-install framework. The framework installs templated Analytics app in orgs via managed packages automatically. The dashboards created for these applications can be embedded in Lightning Experience pages, allowing users to interact with Einstein Analytics directly in Salesforce pages.

Why: You can design Analytics templates to create Analytics apps that don't need customization or user interaction. The auto-install template framework allows you to package your Analytics template, which when installed in a customer org, auto-installs your Analytics app from the template. Users aren't required to manually create the app from the template wizard in Analytics Studio.

How: To specify that your Analytics app template is part of the auto-install framework, create and add the new auto-install.json file in the template directory, alongside the template-info.json file. Then package your template and distribute it. Installation of the packaged template kicks off the auto-install process for your Analytics app.

Supported template types for this file are app and embeddedapp.

The auto-install.json file allows you to configure the name and type of the auto-install request via the hooks settings. The attributes are:

Attribute Name	Туре	Description
type	string	The type of auto-install hook. For Winter '21, PackageInstall is the only supported type.
requestName	string	An optional name for the auto-install request. This name appears on the Auto-Installed Apps Setup page for the request.

The auto-install.json file also allows you to set the app configuration settings. The app configuration settings include:

Attribute Name	Туре	Description
autoShareWithLicensed Users	boolean	Indicates whether the app is automatically shared with users that have the AnalyticsViewOnlyEmbeddedApp license ($true$) or not (false).
autoShareWith Originator	boolean	Indicates whether the app is automatically shared with the user who initiated the auto-install request (true) or not (false).
deleteAppOn ConstructionFailure	boolean	Indicates whether the app is deleted when the auto install request fails due to a construction error (true) or not (false).
failOnDuplicateName	boolean	Indicates whether the app creation fails when an existing app or asset exists with the same developer name (true) or not (false).
values	Мар	A Map of variable values to use when creating the app. The variable names must correspond to variables defined in the variables.json file.

Sample auto-install.json file:

To complete the designation of your template as an auto-install template, add the autoInstallDefinition attribute to your template-info.json file and the name attribute to your folder.json file.

View Einstein Analytics Data Downloads in Your Event Log Files

For tracking, security, or compliance, you can now access logs of data downloads from Einstein Analytics. The download logs exposed in Event Monitoring include session id, user id, asset type and id, dataset id, Salesforce user type, download format (PNG, EXCEL, or CSV), and number of rows downloaded. Use the download log data to create your own datasets and dashboards.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: If you're an Event Monitoring customer, you automatically get the WAVE_DOWNLOAD_EVENT fields in event log data when your users work in Analytics.

SEE ALSO:

EventLogFile Supported Event Types: Wave Download Event Type (can be outdated or unavailable during release preview) IdeaExchange: Event Monitoring for Einstein Analytics (Wave) dashboard and lens downloads

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Customize user prompts for improvements. Use the new Predict function to get predictions in process automation formulas. Determine whether your data has a normal distribution with the new QQ plot.

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IN THIS SECTION:

Guide User Actions with Custom Improvement Text

Einstein Discovery improvements are suggested actions that users can take to improve predicted outcomes. Previously, these suggestions used generic, impersonal text. Now you can customize this text to provide targeted, more specific instructions. You can communicate your organization's recommended practices within the context of your business operations using a tone that reflects your organization's culture. Direct your users to the best possible outcomes.

Predict Outcomes in Process Automation Formulas

Embed predictive intelligence in your process automation formulas with the Einstein Discovery PREDICT function. Now you can make decisions in your automation logic based on predicted outcomes from Einstein Discovery predictions available in your Salesforce org. For example, in an approval process, a formula can determine whether a predicted outcome meets a threshold required for automatic approval. The PREDICT function is available when defining formulas for Next Best Action, validation rules, flows (screen, headless, and invocable), processes (in Process Builder), workflow rules, approval processes, predefined field values, field update actions, and default values.

Enable High Cardinality for One Variable in a Story

High cardinality variables can be hard to interpret and visualize due to their high number of unique values. For this reason, Einstein Discovery ignored unique values above 100 in these variables or grouped them into a reserve category. Now you can add high cardinality variables to a story. Einstein Discovery automatically alerts you when it detects variables containing more than 100 unique values. You can either let Einstein Discovery handle these variables as before, or control how the variables are used.

Visually Determine Whether Your Data Is Normally Distributed

For regression models, one of the key assumptions is that the residual errors for the outcome variable are normally distributed. Use the new QQ (quantile-quantile) plot to quickly check this assumption and determine whether and how residual errors depart from normality. If the QQ plot shows your residual errors to be approximately linear, then you can be confident that your model satisfies the normal distribution assumption.

Update Your Models Regularly with Automatic Refresh

Over time, a deployed model's performance can drift. The model becomes less accurate in predicting outcomes due to changes in the business environment, data, or requirements. To combat drift, refresh your model occasionally by adjusting story settings, retraining it on newer data, and redeploying it. With automatic refresh, you can now schedule weekly or monthly model updates. Unattended refreshes give you peace of mind knowing that your models are regularly updated to reflect the latest, best version.

Stay Informed with Dataset Change Notifications and Applied Filters

We've made it easier to get more accurate insights with notifications of changes to the underlying dataset, and at-a-glance visibility of variable filters. When a story is updated, dataset changes that impact your story triggers a notification banner. The alert prompts you to review your settings and consider creating a new story version based on the latest available data. Filters applied to story variables are now more easily seen within story settings, so you can easily focus or expand your data analysis

Embed Predictions in Your Dataset During Data Prep (Pilot)

Give your predictions direct-to-dashboard visibility. Use the new Discovery Predict transformation for Data Prep to calculate and store predictions in your dataset. You can even store descriptions of top predictors and improvements. When you run a recipe with an Discovery Predict node, Einstein estimates and saves predicted outcomes on a row-by-row basis. Populate your datasets with predictive and prescriptive intelligence to quickly evaluate predictions across a large set of data, assess multiple models before deploying them into production, and aggregate this information in a dashboard.

Minimize Disparate Impact in Your Stories with Sensitive Variables

In Einstein Discovery, you can identify and use variables that have the potential of bias in your story. It's important to monitor these sensitive variables to ensure that they don't negatively influence story insights. If recent story updates are affecting sensitive variables, Einstein Discovery may warn you of disparate impact, meaning other variables are being treated unequally in your model. A model trained on data with disparate impact can produce biased predictions.

Jump-Start Story Creation Using Templates

Not sure where to begin with identifying winning deals or shortening deal cycles? Let the templates build the app, prep and load data, then create a story version using the best practices to meet your goals. Review completed story findings, and then customize the story to meet your needs.

Get Better Tuned XGBoost and GBM Models

We improved the accuracy of models that are based on the XGBoost and GBM algorithms. We tuned internal settings for these models, so this change is automatic. If you compare model metrics between a model created in this release and a model created in a previous release, the metrics may differ.

Implement External Models in Your Salesforce Org (Pilot)

Augment your predictive powers with externally built models that you can quickly start using in your production environment. In addition to the amazing models that Einstein Discovery builds from your stories, you can now upload and deploy models that are created outside of Salesforce. Your data scientists can use their favorite modeling tools to design, build, test, and tune TensorFlow models. Then, simply upload and deploy these carefully crafted models into your Salesforce org. Your users are up and running quickly, and using the model's predictions to achieve better outcomes.

Build Accurate Models Using Random Forest Algorithms (Pilot)

Einstein Discovery now adds a fourth type of model that is based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models via multiple decision trees, randomization, and other optimization techniques. You can compare a random forest model with other types of models to determine whether this algorithm provides better accuracy for your story.

Annotate Story Versions with Descriptions

Ever forget the exact changes that were made in a story version? Maybe why a change was made or who made the change? Now you can add informative and detailed descriptions that provide clarity, accountability, while avoiding redundant work.

Cancel Story Creation During Analysis

Ever wanted to include a last-minute change before clicking Create Story, but had to wait for it to finish just to delete it? You now have the option of interrupting a story after submitting it. No more searching for the story then manually deleting it.

Load Einstein Discovery Stories Faster

Stories with a lot of insights can take longer to load. Einstein Discovery now opens with a story's top 15 insights, then loads more insights as you search for them. Top insights include all first order insights followed by the second order to complete the list.

Focus Your Predictions in Einstein Prediction Service

The default behavior has changed for predict API calls in Einstein Prediction Service. Previously, the response included predictive factors and improvements by default. Starting in this release, the predict function returns just a single prediction value. If you want predictive factors and improvements, you must ask for them in the request body of your API call.

SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

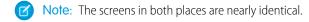
Guide User Actions with Custom Improvement Text

Einstein Discovery improvements are suggested actions that users can take to improve predicted outcomes. Previously, these suggestions used generic, impersonal text. Now you can customize this text to provide targeted, more specific instructions. You can communicate your organization's recommended practices within the context of your business operations using a tone that reflects your organization's culture. Direct your users to the best possible outcomes.

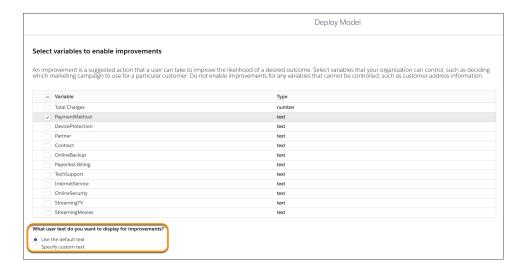
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: You can customize improvement text in two places:

- During deployment using the Deployment Wizard, or
- After deployment using Model Manager



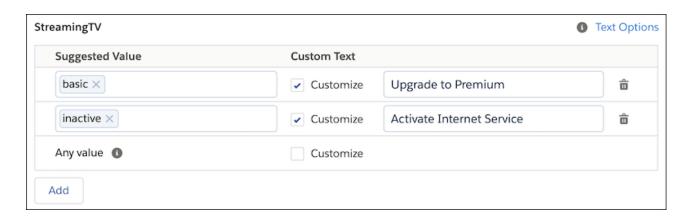
The Deployment Wizard prompts you during deployment. Enable improvements for one or more variables, and then select **Specify custom text**.



In Model Manager, open a prediction, select a model, select **Edit Settings** from the dropdown, and click the **Improvements** subtab. Enable improvements for one or more variables, and then select **Specify custom text**.



For each text variable that you want to customize, click **Add** and specify one or more text values and their associated custom user prompts.



For each number variable that you want to customize, specify the custom text you want for increasing or decreasing the value.



Save your changes. Einstein Discovery communicates with your users using your custom improvements messaging.

SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

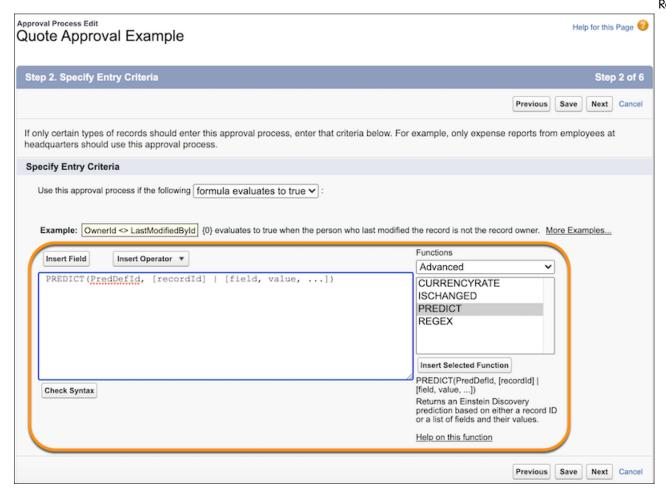
Predict Outcomes in Process Automation Formulas

Embed predictive intelligence in your process automation formulas with the Einstein Discovery PREDICT function. Now you can make decisions in your automation logic based on predicted outcomes from Einstein Discovery predictions available in your Salesforce org. For example, in an approval process, a formula can determine whether a predicted outcome meets a threshold required for automatic approval. The PREDICT function is available when defining formulas for Next Best Action, validation rules, flows (screen, headless, and invocable), processes (in Process Builder), workflow rules, approval processes, predefined field values, field update actions, and default values.

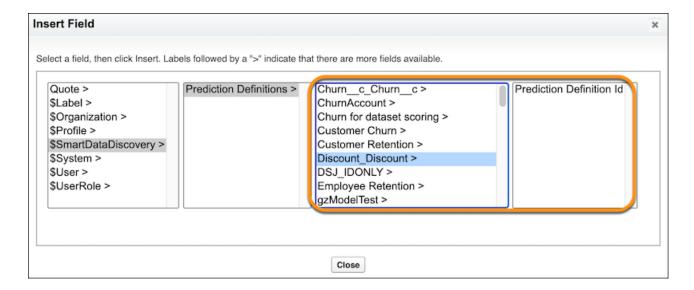
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: When building an automation formula, under **Functions**, select **Advanced**, select **PREDICT**, and click **Insert Selected Function**. The following example shows building a formula for an approval process.

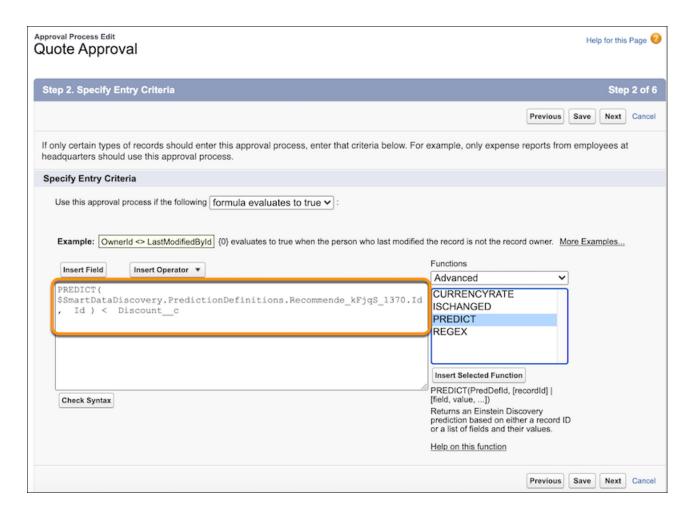
Sync Out for Snowflake, Einstein Discovery Automated Model



In the formula builder, select PredDefId, click Insert Field, select SmartDataDiscovery > Prediction Definitions, select an available prediction, select Prediction Definition Id, and click Insert.



You can get an Einstein Discovery prediction for a record based on the specified record ID or for a list of fields and their values. The following example shows the formula for an approval process that evaluates to TRUE if the predicted outcome for the given record is less than the specified discount amount (Discount c).



SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

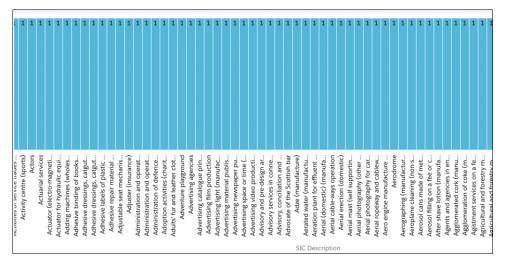
Enable High Cardinality for One Variable in a Story

High cardinality variables can be hard to interpret and visualize due to their high number of unique values. For this reason, Einstein Discovery ignored unique values above 100 in these variables or grouped them into a reserve category. Now you can add high cardinality variables to a story. Einstein Discovery automatically alerts you when it detects variables containing more than 100 unique values. You can either let Einstein Discovery handle these variables as before, or control how the variables are used.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: You can include one high cardinality variable, with a maximum of 200 unique values, in a story. All other variables are limited to 100 unique values. You can also combine field values to minimize unique values.

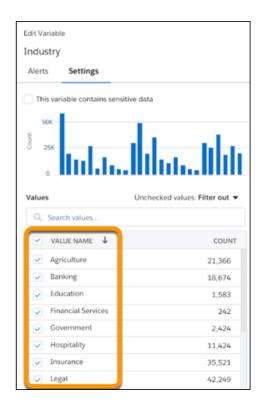
Here's a sampling of a high cardinality variable, Industry. We want to use the variable, however, it contains a high number of unique values.



Click **Edit Story**, select the high cardinality variable, then choose your possible actions on the Alerts tab.



You can also limit the number of unique values in a variable by excluding values from the story. Click the variable's **Settings** tab and deselect the values.



SEE ALSO:

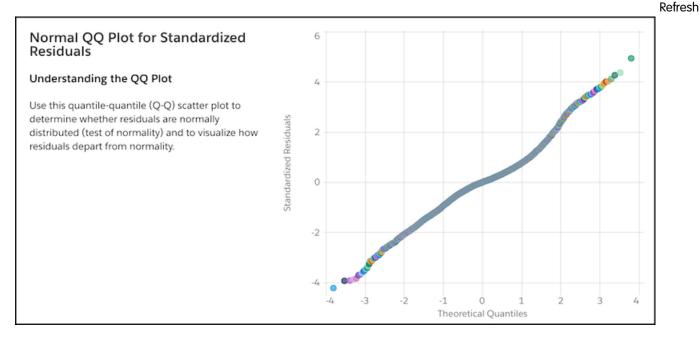
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Visually Determine Whether Your Data Is Normally Distributed

For regression models, one of the key assumptions is that the residual errors for the outcome variable are normally distributed. Use the new QQ (quantile-quantile) plot to quickly check this assumption and determine whether and how residual errors depart from normality. If the QQ plot shows your residual errors to be approximately linear, then you can be confident that your model satisfies the normal distribution assumption.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: For a regression model, open Model Metrics, click **Model Evaluation**. On the Overall Performance subtab, scroll down to the Normal QQ Plot for Standardized Residuals. This example plot is visually linear, which confirms the assumption of a normal distribution.



If the plot is not linear, then consider revisiting the normal distribution assumption and investigate your data.

SEE ALSO:

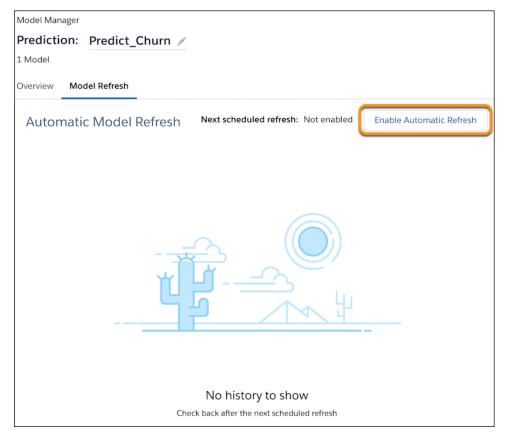
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Update Your Models Regularly with Automatic Refresh

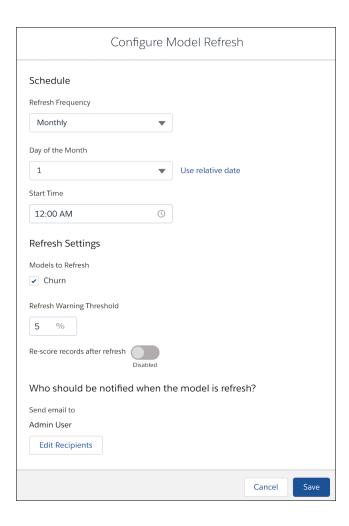
Over time, a deployed model's performance can drift. The model becomes less accurate in predicting outcomes due to changes in the business environment, data, or requirements. To combat drift, refresh your model occasionally by adjusting story settings, retraining it on newer data, and redeploying it. With automatic refresh, you can now schedule weekly or monthly model updates. Unattended refreshes give you peace of mind knowing that your models are regularly updated to reflect the latest, best version.

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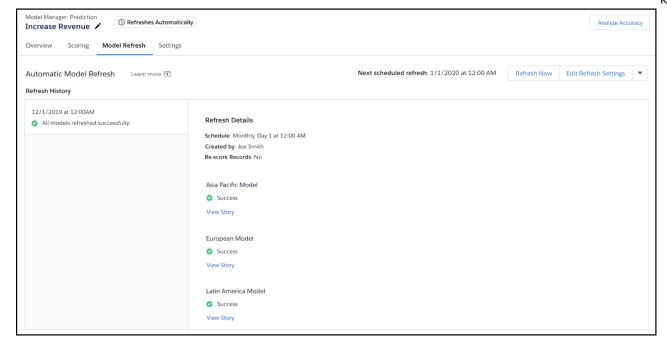
How: In Model Manager, view a prediction, click the Model Refresh subtab, and click Enable Automatic Refresh.



Configure the refresh job settings, including frequency (monthly or weekly), day, and time that you want to refresh. Specify other settings as needed, such as adding users to notify when the model is refreshed, and then save your changes.



Whenever the refresh job completes, subscribed recipients receive an email notification, and the Model Refresh page displays the job history.



SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Stay Informed with Dataset Change Notifications and Applied Filters

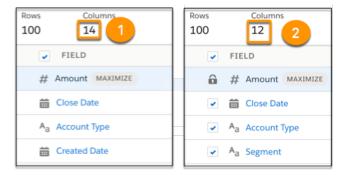
We've made it easier to get more accurate insights with notifications of changes to the underlying dataset, and at-a-glance visibility of variable filters. When a story is updated, dataset changes that impact your story triggers a notification banner. The alert prompts you to review your settings and consider creating a new story version based on the latest available data. Filters applied to story variables are now more easily seen within story settings, so you can easily focus or expand your data analysis

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To review changes to the underlying dataset, click Edit Story then click the banner to see the updates.

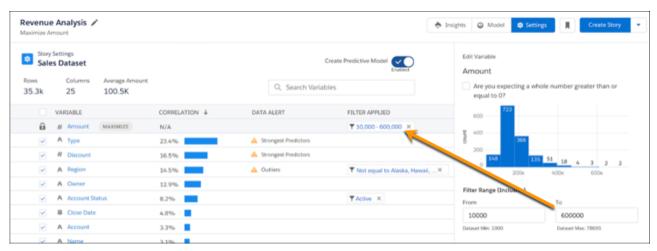


In this example, the current story version has 14 columns (1). After clicking the notification, it shows are 12 columns (2) in the updated dataset.



Click **Update Story** to accept the changes or close story settings to ignore the notification.

View filters by clicking Edit Story to open story settings. Filters are listed in the FILTER APPLIED column.



To take advantage of the improved filtering and preserve filters from previous versions, update their filter settings and save them in a new story version.

SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

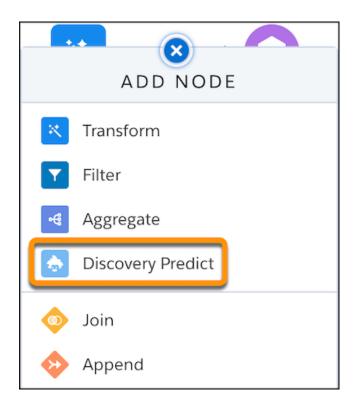
Embed Predictions in Your Dataset During Data Prep (Pilot)

Give your predictions direct-to-dashboard visibility. Use the new Discovery Predict transformation for Data Prep to calculate and store predictions in your dataset. You can even store descriptions of top predictors and improvements. When you run a recipe with an Discovery Predict node, Einstein estimates and saves predicted outcomes on a row-by-row basis. Populate your datasets with predictive and prescriptive intelligence to quickly evaluate predictions across a large set of data, assess multiple models before deploying them into production, and aggregate this information in a dashboard.

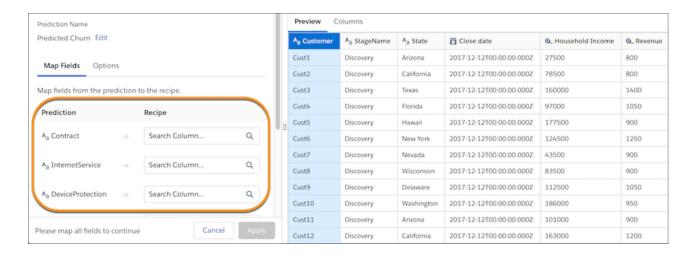
Note: This feature is in pilot only because it currently does not support packaging.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

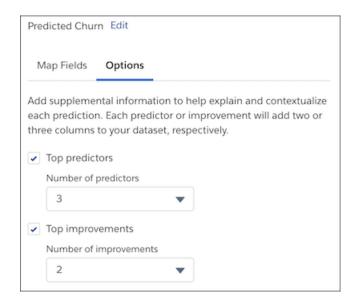
How: In Data Prep, open a recipe that has at least one Input node. Select the Add Node button (+) between two nodes or at the end of the recipe, and select **Discovery Predict**.



Select an Einstein Discovery prediction deployed in your org, and then map all prediction fields to the recipe.



Optionally, you can store top predictors and improvements in the dataset for quick and easy display on a dashboard.



SEE ALSO:

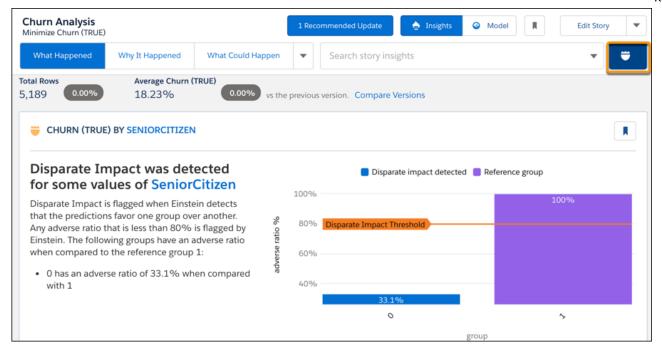
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Minimize Disparate Impact in Your Stories with Sensitive Variables

In Einstein Discovery, you can identify and use variables that have the potential of bias in your story. It's important to monitor these sensitive variables to ensure that they don't negatively influence story insights. If recent story updates are affecting sensitive variables, Einstein Discovery may warn you of disparate impact, meaning other variables are being treated unequally in your model. A model trained on data with disparate impact can produce biased predictions.

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How: Disparate impact gets flagged in the story version where it occurs. Click the shield icon to review the insights.



Revisit your model, filter out sensitive variables, and investigate their insights. Use the details collected to help you decide if these sensitive variables serve your analysis or if they are to be removed.

SEE ALSO:

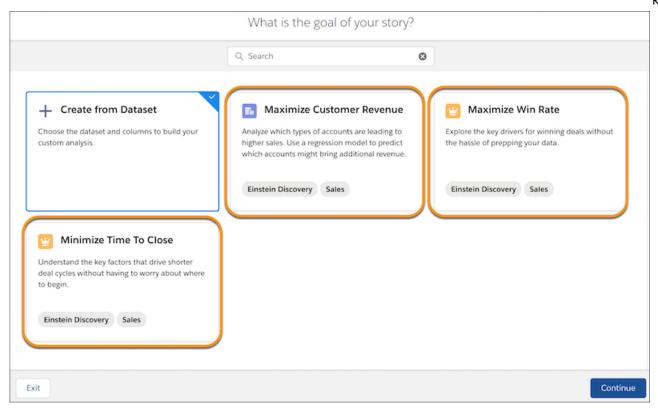
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Jump-Start Story Creation Using Templates

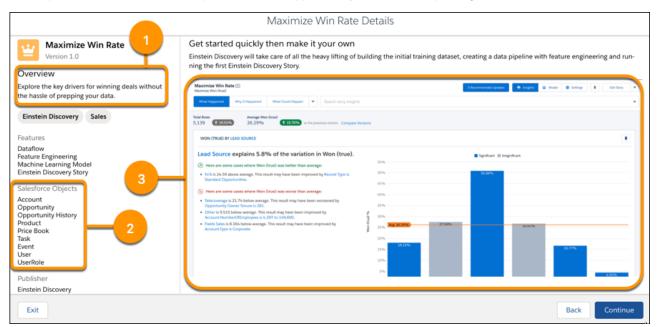
Not sure where to begin with identifying winning deals or shortening deal cycles? Let the templates build the app, prep and load data, then create a story version using the best practices to meet your goals. Review completed story findings, and then customize the story to meet your needs.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Analytics Studio, click **Create** then **Story**. Select one of the listed templates.



The template overview includes a description (1), a list of supported objects (2), and sample insights (3).



SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Refresh

Get Better Tuned XGBoost and GBM Models

We improved the accuracy of models that are based on the XGBoost and GBM algorithms. We tuned internal settings for these models, so this change is automatic. If you compare model metrics between a model created in this release and a model created in a previous release, the metrics may differ.

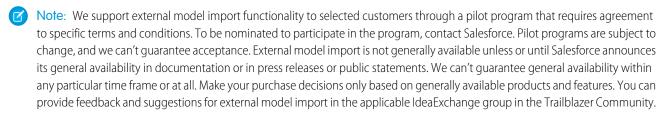
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SEE ALSO:

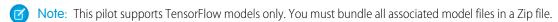
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Implement External Models in Your Salesforce Org (Pilot)

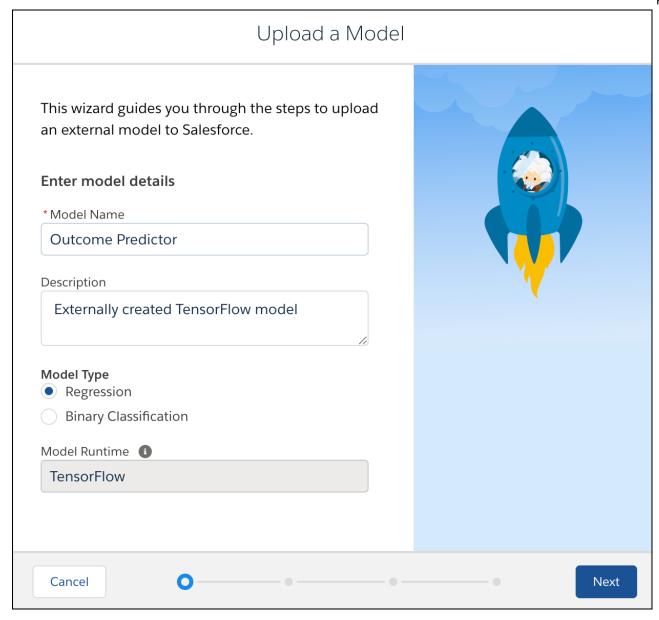
Augment your predictive powers with externally built models that you can quickly start using in your production environment. In addition to the amazing models that Einstein Discovery builds from your stories, you can now upload and deploy models that are created outside of Salesforce. Your data scientists can use their favorite modeling tools to design, build, test, and tune TensorFlow models. Then, simply upload and deploy these carefully crafted models into your Salesforce org. Your users are up and running quickly, and using the model's predictions to achieve better outcomes.



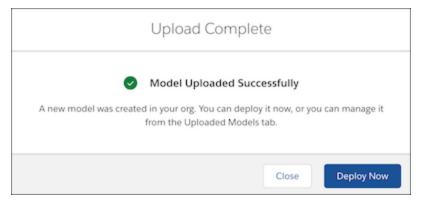
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



How: Open Model Manager and click **Upload** to launch the Upload Model wizard.



Specify details about this model, then click **Next** to specify all model variables and select the outcome the model predicts. Select the Zip file containing the TensorFlow model files and click **Done**. You can either deploy this model immediately into your Salesforce environment, or click **Close** to add it to the Uploaded Files tab for later deployment.



SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Build Accurate Models Using Random Forest Algorithms (Pilot)

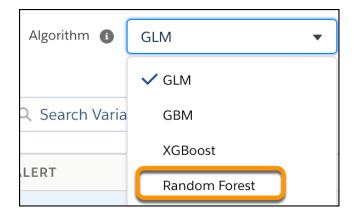
Einstein Discovery now adds a fourth type of model that is based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models via multiple decision trees, randomization, and other optimization techniques. You can compare a random forest model with other types of models to determine whether this algorithm provides better accuracy for your story.



Note: We provide random forest model functionality to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Random forest models are not generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for random forest models in the applicable IdeaExchange group in the Trailblazer Community.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In story setup, click the Algorithm list and select Random Forest (Pilot).



After creating the story, go to Model Metrics and compare the accuracy of this model with models created using other algorithms.



Note: For the pilot, random forest models are interpretable—the results of their analysis show up in the Why It Happened tab—but they cannot be deployed.

SEE ALSO:

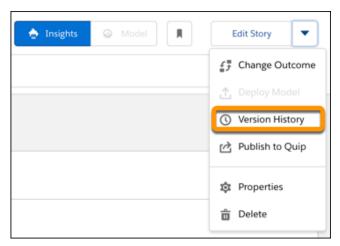
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Annotate Story Versions with Descriptions

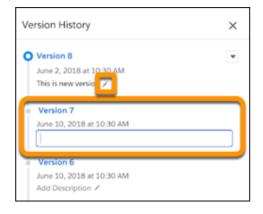
Ever forget the exact changes that were made in a story version? Maybe why a change was made or who made the change? Now you can add informative and detailed descriptions that provide clarity, accountability, while avoiding redundant work.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To add a description, click the dropdown menu next to Edit Story then click **Version History**.



Click the edit icon for the version to update.



SEE ALSO:

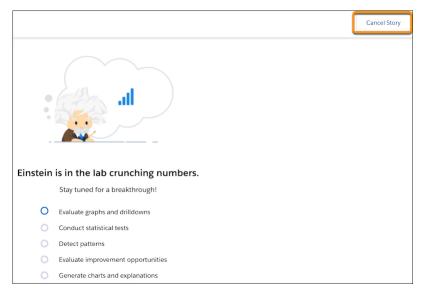
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Cancel Story Creation During Analysis

Ever wanted to include a last-minute change before clicking Create Story, but had to wait for it to finish just to delete it? You now have the option of interrupting a story after submitting it. No more searching for the story then manually deleting it.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: The Cancel Story button appears after initiating a new story or revision. Click the button to halt the process.



Canceling a new story returns you to the Home page. Canceling a revision returns you to the current story version.

SEE ALSO:

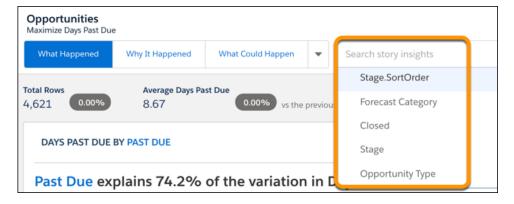
Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Load Einstein Discovery Stories Faster

Stories with a lot of insights can take longer to load. Einstein Discovery now opens with a story's top 15 insights, then loads more insights as you search for them. Top insights include all first order insights followed by the second order to complete the list.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Open a story to automatically load the top insights. Load more insights by scrolling towards the bottom of the list or use search to retrieve related insights.



SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Focus Your Predictions in Einstein Prediction Service

The default behavior has changed for predict API calls in Einstein Prediction Service. Previously, the response included predictive factors and improvements by default. Starting in this release, the predict function returns just a single prediction value. If you want predictive factors and improvements, you must ask for them in the request body of your API call.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How See the example request in Get Predictions in Salesforce help.

SEE ALSO:

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Analytics for Everyone: Watchlist (Generally Available), Dynamic Lens Subscriptions (Generally Available), Image Security

Track metrics across multiple dashboards and monitor changes over time with Watchlist, which is now generally available and comes enabled in your Salesforce org. Get timely email updates with subscriptions, also now generally available, and subscribe to lenses as well as dashboard widgets. Use new image security controls to prevent sharing or downloading sensitive images of dashboards and lenses.

IN THIS SECTION:

Monitor Important Metrics with the Einstein Analytics Watchlist (Generally Available)

The Einstein Analytics Watchlist gives you the advantage of capturing and tracking up to 20 KPIs across different dashboards, plus historical trending. Track your metrics in one place, meaning no more switching between dashboards to see what's changed. This feature is now generally available.

Subscribe to Lenses and Dashboard Widgets for Timely Email Updates (Generally Available)

No more hunting for the metrics, charts, and tables that you routinely consult. Let them come to you in daily or weekly emails. Subscriptions are generally available, and now you can subscribe to lenses as well as dashboard widgets. Lens subscriptions work the same as widget subscriptions, with one exception. While a widget subscription is based on a snapshot of your query, a lens subscription is dynamic. This means any change saved to a subscribed lens is automatically reflected in the subscription email and preview.

Control Who Shares Dashboard and Lens Images

Restrict image downloads and shares with a new setting and new permission. By default, all users can share images of lenses, dashboard widgets, and whole dashboards that contain your org's data. Use the new controls to prevent users or profiles from sharing sensitive images.

Analytics Mobile Apps: Do More on the Go in the Salesforce App

With the latest update to the new Salesforce mobile app, iOS users can access dashboards from record pages using custom links. Also, Android users can access Einstein Analytics assets from the Analytics navigation item.

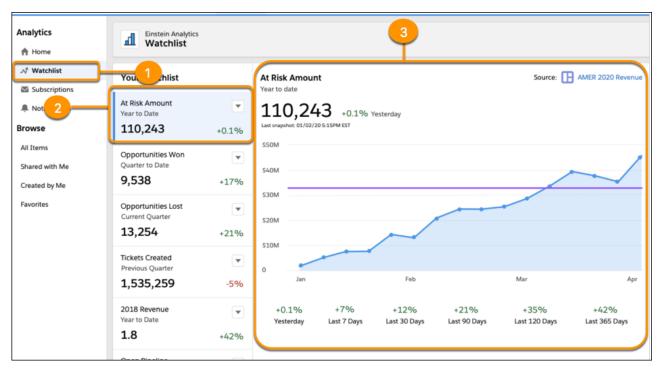
Monitor Important Metrics with the Einstein Analytics Watchlist (Generally Available)

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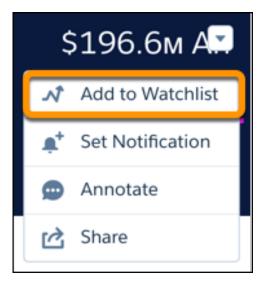
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Watchlist is automatically enabled on your org, but you can disable it. From Setup, in the Quick Find box, enter **Analytics**, and then select **Settings**. Deselect **Enable Watchlist**.

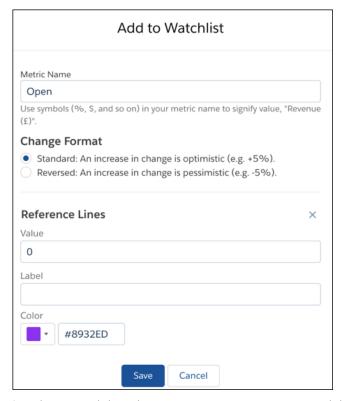
With the Watchlist (1), users can create a personalized list of up to 20 metrics. Click Watchlist items to view metric values (2), and timeline charts (3).



No more switching between dashboards to see what has changed, users can quickly and easily track their metrics all in one place. Get your Watchlist started by adding metrics directly from a dashboard. Simply select **Add to Watchlist** from a widget's menu.



Give the metric a name (1), select how positive and negative changes are reported (2), and add an optional reference line (3) for trend comparisons.



Snapshots occur daily, and you can expect to see your metrics and charts on your Watchlist 24 hours after adding them.

Subscribe to Lenses and Dashboard Widgets for Timely Email Updates (Generally Available)

No more hunting for the metrics, charts, and tables that you routinely consult. Let them come to you in daily or weekly emails. Subscriptions are generally available, and now you can subscribe to lenses as well as dashboard widgets. Lens subscriptions work the same as widget subscriptions, with one exception. While a widget subscription is based on a snapshot of your query, a lens subscription is dynamic. This means any change saved to a subscribed lens is automatically reflected in the subscription email and preview.

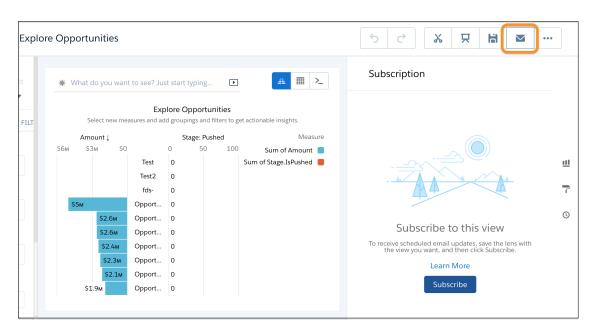
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To access subscriptions, users need the Use Subscription Emails user permission in a permission set associated with an Einstein Analytics Growth or Einstein Analytics Plus license. To subscribe to tables and receive email with the table data in attached .csv files, users also need the Download Analytics Data user permission. Note that the permission we used for the beta feature, Subscribe to Einstein Analytics Tables, is no longer available.

How: Assign the Use Subscription Emails permission for users or profiles that you want to allow to receive email with your org's data. Note that the org preference we used for the beta feature, **Enable email subscriptions to Einstein Analytics dashboard widgets**, is no longer available in Analytics Settings.

(1) Important: Existing subscriptions continue to be available, but you must assign the new permission for users to access them.

To subscribe to a lens, first save it in explorer. Then click the Show Subscriptions icon () to open the Subscription panel, and click **Subscribe**.



You can subscribe to any lens that is saved in SAQL format in the explorer. If you must convert a lens to SAQL, we let you know when you try to subscribe. To convert to SAQL, open Query Mode, click **Run Query**, and then save the lens.



Ø

Note: Because a lens subscription is dynamically in sync with its lens, you can't delete a lens while there's a subscription to it.

SEE ALSO:

Salesforce Help: Get Scheduled Updates with Email Subscriptions (can be outdated or unavailable during release preview)

Control Who Shares Dashboard and Lens Images

Restrict image downloads and shares with a new setting and new permission. By default, all users can share images of lenses, dashboard widgets, and whole dashboards that contain your org's data. Use the new controls to prevent users or profiles from sharing sensitive images.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: From Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. On the Settings page, select **Secure Image Sharing and Downloading**. This setting blocks image sharing for everyone in your org.

Now you can allow image sharing by user or profile. From Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**. Edit the permission set where you want to enable image sharing, open System Permissions, and then select **Share Analytics Images**.

With the Share Analytics Images user permission enabled, users can do the following actions with images of lenses, dashboard widgets, and whole dashboards.

- Download .png images
- Export images to Quip
- Post images to Chatter
- Include images in annotations
- Share images from conversational explorations and subscription previews

Analytics Mobile Apps: Do More on the Go in the Salesforce App

With the latest update to the new Salesforce mobile app, iOS users can access dashboards from record pages using custom links. Also, Android users can access Einstein Analytics assets from the Analytics navigation item.

IN THIS SECTION:

Access Dashboards from a Record Page with Custom Links

Embedded dashboards are great because they put relevant data where it matters most: directly in the record. But embedded dashboards aren't always optimized for mobile devices. They take up limited screen space, and they take time to load when connectivity is less than ideal. Now you can use custom links to fast-track how your mobile users access dashboards from records.

Use Einstein Analytics in the Salesforce Mobile App for Android

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item. The new item creates a familiar user experience between desktop and mobile, and gives Salesforce mobile app users a home page for accessing apps and dashboards.

Upgrade to the Winter '21 Versions of Einstein Analytics for iOS and Android

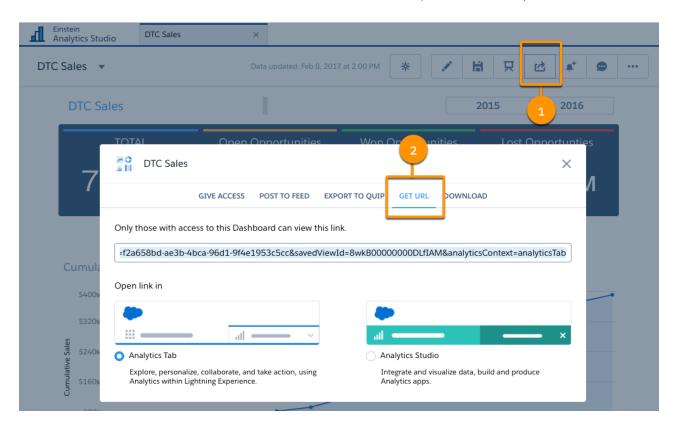
Einstein Analytics version 11.0 is generally available.

Access Dashboards from a Record Page with Custom Links

Embedded dashboards are great because they put relevant data where it matters most: directly in the record. But embedded dashboards aren't always optimized for mobile devices. They take up limited screen space, and they take time to load when connectivity is less than ideal. Now you can use custom links to fast-track how your mobile users access dashboards from records.

Where: This change applies to Lightning Experience and version 226.030 or higher of the Salesforce mobile app for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

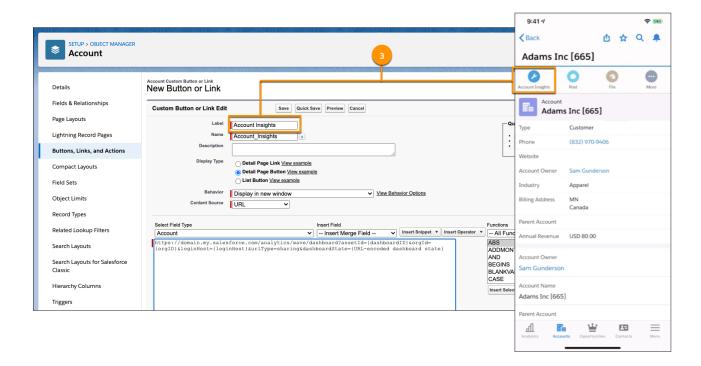
How: To create a custom URL to a dashboard, use the Share (1) and GET URL (2) option in Einstein Analytics.



To optionally open a dashboard in a specific state, add the dashboardState parameter to the URL. Use this syntax for the custom link URL.

https://domain.my.salesforce.com/analytics/wave/dashboard?assetid={dashboardID}&orgid={orgID}&loginHost={loginHost}&urlType=sharing&dashboardState={URL-encoded dashboard state}

In Setup, add the custom link URL to a record page in the Object Manager. For example, create an *Account Insights* (3) link so account owners can launch a sales metrics dashboard with relevant filters applied directly from a record.



SEE ALSO:

Salesforce Help: Launch Einstein Analytics Assets with URLs (can be outdated or unavailable during release preview)
Salesforce Help: Share Dashboards, Widgets, and Lenses (can be outdated or unavailable during release preview)

Use Einstein Analytics in the Salesforce Mobile App for Android

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item. The new item creates a familiar user experience between desktop and mobile, and gives Salesforce mobile app users a home page for accessing apps and dashboards.

Where: This change applies to Lightning Experience and version 226.030 or higher of the Salesforce mobile app for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Admins can add the Analytics navigation item to Lightning apps in the Lightning App Builder. Analytics does not show up in the Mobile Only navigation item list in the App Launcher.



Note: Lenses and datasets that aren't supported in the Salesforce mobile app open in the Einstein Analytics for Android app.

Upgrade to the Winter '21 Versions of Einstein Analytics for iOS and Android

Einstein Analytics version 11.0 is generally available.

IN THIS SECTION:

Take Analytics Anywhere with Mobile Offline (Beta)

No internet? No problem. Now you can view and analyze data even when internet access isn't available.

More Enhancements in Einstein Analytics for iOS

Einstein Analytics for iOS now supports additional Winter '21 features.

More Enhancements in Einstein Analytics for Android

Einstein Analytics for Android now supports additional Winter '21 features.

Take Analytics Anywhere with Mobile Offline (Beta)

No internet? No problem. Now you can view and analyze data even when internet access isn't available.



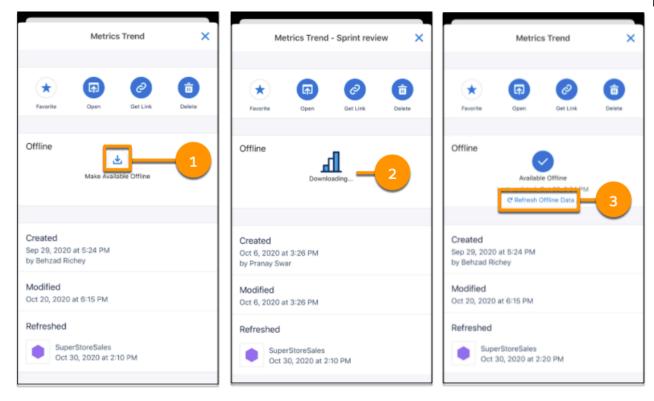
Note: As a beta feature, Mobile Offline is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Mobile Offline in the Trailblazer Community.

Where: This change applies to Einstein Analytics for iOS using iOS 13.3 and higher. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Contact your Salesforce account representative to enable Mobile Offline.

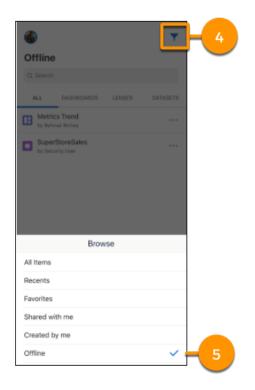
When you have internet access, set up Mobile Offline. Tap the three dots next to the name of a dashboard, lens, or dataset to view its details panel. Then tap **Make Available Offline** (1). When the asset finishes downloading (2), you're ready to take data analysis anywhere you want to go.



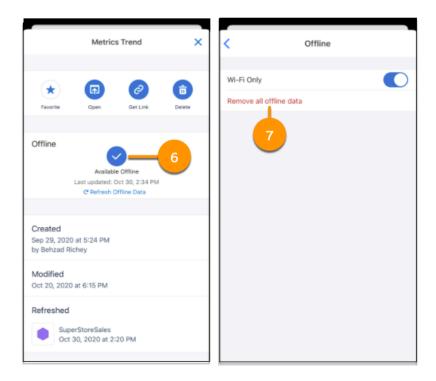


Analytics uses live data whenever you have internet access. Also, offline assets aren't automatically updated when internet access is available. Keep your offline data fresh by tapping **Refresh Offline Data** (3) when internet access is available.

To see all assets available for offline access, tap the filter icon (4), and then select **Offline** (5).



To remove offline access for a specific asset, open the details panel, and then tap the check mark above Available Offline (6). To remove all offline access, go to **Settings**, tap **Offline**, and then tap **Remove all offline data** (7).



Keep these considerations in mind when using Mobile Offline.

- To save on mobile data costs, offline data is downloaded using Wi-Fi only. To download data using both Wi-Fi and cellular networks, go to **Settings**, tap **Offline**, and then turn off **Wi-Fi Only**.
- If assets exceed 250 MB or the storage capacity of the device, they aren't available for offline access.
- Mobile Offline settings apply to individual mobile devices and aren't synced across multiple devices.
- When removing offline data, all data used by an asset is removed unless another offline asset uses the same data.
- All offline data is removed from the device when you log out or uninstall the app.
- Offline-enabled assets are stored on the device using Salesforce encryption standards for mobile devices. Unencrypted data is never stored on a device at any time.
- Some features aren't supported for offline dashboards and lenses.
 - Images
 - Custom maps
 - Linking
 - Personal views
 - Save, Save As
 - Post to Chatter, Share via Email

APEX, SOQL

SEE ALSO:

Salesforce Help: Access Data When You're Offline

More Enhancements in Einstein Analytics for iOS

Einstein Analytics for iOS now supports additional Winter '21 features.

Where: These changes apply to Einstein Analytics for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Enhancements in the latest releases include the following features.

- Support for Winter '21 features, including conditional formatting for dynamic text.
- Time Zone: Add accuracy to your insights with date and time data in your local time zone.
- Bug fixes.

How: Analytics is available for devices running iOS 12.2 and later. For the latest enhancements, download Einstein Analytics from the App Store.

More Enhancements in Einstein Analytics for Android

Einstein Analytics for Android now supports additional Winter '21 features.

Where: These changes apply to Einstein Analytics for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited Editions.

Why: Enhancements in the latest releases include the following features.

- Support for Winter '21 features, including conditional formatting for dynamic text.
- New Date Widget: The brand new date widget has preset dates, a range operator, and more freedom in setting relative dates.
- Time Zone: Add accuracy to your insights with date and time data in your local time zone.
- Bug fixes.

How: Analytics is available for devices running Android 5 or later. For the latest enhancements, download Einstein Analytics from Google Play[™].

What's New In SAQL: Support for Custom Fiscal Year, Multi-Value Field Conversion to Strings

SAQL functionality continues to expand with custom fiscal year support, multi-value fields-to-string functionality, and additional string, math, and date functions.

IN THIS SECTION:

Get Custom Fiscal Year Support in Einstein Analytics (Generally Available)

Einstein Analytics can now inherit custom fiscal years defined in Salesforce. After they're inherited, you can create dashboards and write SAQL queries that use this data.

Convert Multi-Value Fields to String Fields in SAQL (Beta)

Querying multi-value fields presents a challenge: Only one item appears in query results. By converting each set of multiple values to a single, alphabetical, delimited string, a new SAQL function, mv_to_string(), shows all items in a multi-value field. The field remains multi-value in the dataset. This change applies to the query projection and results only.

Write Local Time Zone-Specific Queries with Single Custom Time Zone (Beta)

Einstein Analytics now supports local time zone information in dashboards and SAQL queries. When you enable this feature, you can use the DateTime and DateOnly fields to write queries that pertain to a local time zone as opposed to GMT. Using the local time zone makes your query results more meaningful for a global audience. To learn more, see Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Beta) on page 333.

Use Trigonometry and ASCII Conversion Functions in SAQL Queries

Implement the same functionality as your other favorite query languages with SAQL's trigonometry and ASCII conversion functions.

Access Date Information With More Functions for Fiscal Year Data

From the team who brought you functions to retrieve the last day of a week, month, quarter, or year comes the same functionality for the first days. In addition to new first day functions, both first- and last- date functions are now available for fiscal year data. These functions work the same, but have the fiscal prefix.

Get Custom Fiscal Year Support in Einstein Analytics (Generally Available)

Einstein Analytics can now inherit custom fiscal years defined in Salesforce. After they're inherited, you can create dashboards and write SAQL queries that use this data.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use SAQL, you must have an Analytics Platform license.

How: If you haven't already defined a custom fiscal year in Salesforce Setup, see Salesforce Help.

Here's how to inherit a custom fiscal year in Einstein Analytics.

- 1. From Setup, in the Quick Find box, enter Analytics, and then select **Settings**.
- 2. Select Inherit the custom fiscal year defined in Salesforce Setup, and then click Save.

When selected, Einstein Analytics displays fiscal date values and filters based on the custom fiscal year defined in Salesforce Setup. When unselected, Einstein Analytics bases date values and filters on a standard fiscal year.

- **3.** Choose which date to base fiscal year on.
 - **a.** End Date—If your fiscal year starts in April 2020 and ends in March 2021, your fiscal year is 2021.
 - b. Start Date—If your fiscal year starts in April 2020 and ends in March 2021, your fiscal year is 2020.

4. Click Save.

Custom fiscal year data is available on a per-dataset basis after each dataset's dataflow runs. Before working with custom fiscal year data in SAQL, make sure to run your dataflows after you define your custom fiscal year in Salesforce.

Einstein Analytics indicates custom fiscal year data by creating new fields that have the suffix _Fiscal. It evaluates the date fields to ensure that every record falls into the Fiscal Year, Fiscal Quarter, Fiscal Month, and Fiscal Week as defined in Salesforce Setup.

This SAQL query groups by the custom fiscal year field and shows the number of opportunities for each year. The CreatedDate_Year_Fiscal field has the _Fiscal suffix.

```
q = load "opportunities";
q = group q by 'CreatedDate_Year_Fiscal';
q = foreach q generate
```

```
'CreatedDate_Year_Fiscal' as 'Fiscal Year',
count() as 'count';
q = order q by 'CreatedDate_Year_Fiscal' asc;
q = limit q 2000;
```

Fiscal Year	Count
2017	2
2018	1
2019	1
2020	1
2021	1
2022	1

SEE ALSO:

Analytics SAQL Reference: Work with Custom Fiscal Year Data IdeaExchange: Enable Custom Calendar (Fiscal Period) in WAVE

Convert Multi-Value Fields to String Fields in SAQL (Beta)

Querying multi-value fields presents a challenge: Only one item appears in query results. By converting each set of multiple values to a single, alphabetical, delimited string, a new SAQL function, mv_to_string(), shows all items in a multi-value field. The field remains multi-value in the dataset. This change applies to the query projection and results only.

Where:

This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



Note: As a beta feature, mv_to_string() is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for this feature in the Trailblazer Community.

Who: To use SAQL, you must have an Analytics Platform license.

Why: Say that you have a dataset that tracks which salespeople work with each account. The dataset has two columns: Account and Account Team, and Account Team is a multi-value field.

A simple query returns each account and the people working on that account, but the Account Team field shows only one person working on each account, even though there are more people.

```
q = load "Accounts"
q = foreach q generate
    'Account' as 'Account',
    'Account_Team' as 'Account Team';
```

Account	Account Team
Acme	Fred Williamson
DTC Electronics	Brian Alison
Salesforce	Nadia Smith

With the mv_to_string () function, analysts can convert the Account Team field from multi-value to an alphabetically sorted, delimited string. When converted to a string, the query results show everyone on each account team. And analysts can work with any of the SAQL string functions, for example, to search for names.

How: To enable mv_to_string(), contact Salesforce Customer Support. To convert a multi-value field to a string, invoke the mv_to_string() function.

```
q = load "Accounts";
q = foreach q generate
    'Account' as 'Account';
    mv_to_string('Account_Team') as 'Account Team';
```

The query now returns values of Accounts Team as a string delimited by a comma and a space (,)—the default delimiter—in alphabetical order.

Account	Account Team
Acme	Fred Williamson, Hank Chen, Sarah Vasquez
DTC Electronics	Brian Alison, Tessa McNaley
Salesforce	Nadia Smith

To return a string with a custom delimiter, specify the delimiter as a string when invoking mv to string().

```
q = load "Accounts";
q = foreach q generate
    'Account' as 'Account';
    mv_to_string('Account_Team', ";;") as 'Account Team';
```

The guery returns the values of Accounts Team delimited by two semicolons (;;) in alphabetical order.

Account	Account Team
Acme	Fred Williamson;;Hank Chen;;Sarah Vasquez
DTC Electronics	Brian Alison;;Tessa McNaley
Salesforce	Nadia Smith

 mv_to_string () applies to non-grouped dimensions only. You can run filtering or grouping on a multi-value field post-projection. Here's the syntax of the mv_to_string () function.

```
mv_to_string(multi-value_column_name, delimiter)
```

multi-value column name

Name of the multi-value field to be converted to a string.

delimiter

Optional. The characters used to delimit values in the converted string. Maximum length is 2 characters. Default value is a comma followed by a space (,).



Note: In order for mv_to_string to display all values of a multi-value field, dataset registration requires extra indexing. That indexing can slow registration down. If this is a concern, you can disable this feature in Setup. If you run mv_to_string() with the indexing turned off, the function returns the first value in the first field only.

- 1. Enter Analytics in the Quick Find box.
- 2. Select **Settings** from the list of Analytics options.
- 3. In Settings, click the checkbox for Exclude multi-value dimension values in Einstein Analytics.

Use priority scheduling for dataflow requests i	Disable this feature so that the
Secure image sharing and downloading i	mv_to_string() function shows only the first indexed value of a multi-value field. Values
Maximum number of hours an app can be in progress: 48	display in alphabetical order.
Exclude multi-value dimension values in Einstein Analytics i	

SEE ALSO:

Analytics SAQL Reference: mv to string()

Write Local Time Zone-Specific Queries with Single Custom Time Zone (Beta)

Einstein Analytics now supports local time zone information in dashboards and SAQL queries. When you enable this feature, you can use the DateTime and DateOnly fields to write queries that pertain to a local time zone as opposed to GMT. Using the local time zone makes your query results more meaningful for a global audience. To learn more, see Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Beta) on page 333.

Use Trigonometry and ASCII Conversion Functions in SAQL Queries

Implement the same functionality as your other favorite query languages with SAQL's trigonometry and ASCII conversion functions.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use SAQL, you must have an Analytics Platform license.

How: The following functions are new.

Math

- pi(**n**)
- degrees (n)
- radians (n)
- sin(**n**)
- cos(n)
- tan (n)

- asin(**n**)
- acos (**n**)
- atan (n)
- sign(**n**)

The trigonometry functions follow this pattern:

```
q = foreach q generate trigFunction(measurement) as value;
```

As an example, let's find the cosine of 60 degrees.

```
q = foreach q generate cos(radians(60)) as cosine;
```

First, the radians () function converts 60 degrees to radians, which returns 1.0472. For those of you who remember geometry, that's $\pi/6$.

Then, it takes the cosine of 1.0472.

```
q = foreach q generate cos(1.0472) as cosine;
```

This guery returns the value of approximately 0.5.

String

- ascii(**n**)
- chr (n)

You can now convert the ASCII value of a character to UTF-8 and vice versa. Here's an example.

```
q = foreach q generate ascii("a") as int_value;
```

This guery returns 97.

Now, let's convert the UTF-8 value back to ASCII

```
q = foreach generate chr(97) as char_value;
```

This query returns the character "a".

SEE ALSO:

Analytics SAQL Reference: Math Functions Analytics SAQL Reference: String Functions

Access Date Information With More Functions for Fiscal Year Data

From the team who brought you functions to retrieve the last day of a week, month, quarter, or year comes the same functionality for the first days. In addition to new first day functions, both first- and last- date functions are now available for fiscal year data. These functions work the same, but have the fiscal prefix.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use SAQL, you must have an Analytics Platform license.

How: Here are the new date functions available in SAQL.

Refresh

Standard Year Dates

- week first day
- month first day
- quarter first day
- year first day

Fiscal Year Dates

- fiscal week first day
- fiscal month first day
- fiscal quarter first day
- fiscal year first day
- fiscal_week_last_day
- fiscal month last day
- fiscal quarter last day
- fiscal year last day

Use them in a foreach () statement. You cannot use them in group by, order by, or filter statements.



Note: You can't use fiscal date functions in recipes and dataflow transformations.

For both standard calendar year and fiscal year dates, follow this pattern:

```
q = foreach q generate timeSegment_firstOrLast_day(toDate('DateFieldName')) as
'TimeSegment FirstOrLast Day';
```

This example query uses a dataset of sales opportunities to return the first day of each month for the first five Close Date sec epoch fields. The opportunity closing dates are in Unix Epoch Time.

```
q = load "DTC_Opportunity";
q = foreach q generate month_first_day(toDate('Close_Date_sec_epoch')) as 'Month First
Day';
q = limit q 5;
```

Here are the query results.

#	Account Team
1	2015-11-01 00:00:00
2	2016-03-01 00:00:00
3	2016-09-01 00:00:00
4	2016-08-01 00:00:00
5	2016-06-01 00:00:00

To learn more about accessing custom fiscal year data in Einstein Analytics, see Get Custom Fiscal Year Support in Einstein Analytics (Generally Available) on page 375.

SEE ALSO:

Analytics SAQL Reference: Work with Custom Fiscal Year Data Analytics SAQL Reference: Last Day in the Week, Month, Quarter, or Year Analytics SAQL Reference: First Day in the Week, Month, Quarter, or Year Salesforce Help: Date Formats and Fiscal Dates for Source Data

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Bots are faster to build and more collaborative with intent model enhancements. Opportunity Scoring has filters to let you decide which records and fields are considered. Personalization tailors search results to the way each user works in Salesforce.

Learn about these Einstein features and more!

Salesforce Overall

Einstein Search: Personalization (Generally Available), Easier Setup at the Org Level, Improved Natural Language Search (Beta)

Personalization is now generally available. Enable this feature and all other features at the org level with just a few clicks. Get better natural language searches (beta) now that common words are ignored, and go ahead and rename an object supported by natural language search. Einstein Search can find it.

Service

Einstein Bots: Everyone Can Bot with Intro Template, Intent Model Enhancements, and New Permissions

This Einstein Bots release is all about bringing more bots to more people. Get started with Bots faster by creating a bot from a template in Guided Setup. Build robust intent models with Input Recommender, and invite more team members to build and manage your intent model with enhanced permissions. We're adding three new languages and innovative accessibility features to Map View. And you can add custom context variables to your bot to capture important incoming information about your customers.

Sales

Sales Cloud Einstein: More Control of the Opportunity Scoring Model, Global Models for Lead Scoring, and Big Improvements to Einstein Activity Capture

When setting up Einstein Opportunity Scoring, choose to have Einstein look only at certain opportunity records and custom fields. Use Einstein Lead Scoring even when you don't have enough data of your own. And get more out of Einstein Activity Capture with new connection and configuration options.

Industries

Einstein Visit Recommendations: Plan Visits to the Right Stores at the Right Time

Sales managers can stop worrying about which stores their sales reps must visit next because Einstein does it for them. Visit recommendations are based on and tailored to address your unique business requirements. Create one or more strategies based on your business requirements in Einstein Next Best Action.

Analytics

Einstein Discovery: Custom Improvements Text, Predict Outcomes in Process Automation Formulas, High Cardinality

Customize user prompts for improvements. Use the new Predict function to get predictions in process automation formulas. Determine whether your data has a normal distribution with the new QQ plot.

Customization

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric Predictions

Einstein Recommendation Builder delivers personalized, Al-driven recommendations of anything to anyone. Einstein Prediction Builder supports record-level insights for numeric predictions.

Development

Einstein Vision and Language: Image Recognition and Natural Language Processing

Not a data scientist or machine-learning expert but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

Commerce: Order Management Enhancements and Enhanced Lightning B2B Commerce Capabilities

Check out what's new in Salesforce Order Management and Lightning B2B Commerce.

IN THIS SECTION:

Salesforce Order Management: Process Exception Management, Return Merchandise Authorizations, and Other Enhancements

Enhancements to Salesforce Order Management include the addition of tools to help you detect and respond to issues—process exceptions—that interrupt normal order processing, a new return order data model for managing return merchandise authorizations, new and updated order summary flows, the ability to configure custom payment methods, and the ability to create order summaries with custom numbers and statuses.

Lightning B2B Commerce: New Components for Deliveries and Order Summaries, Enhancements to Searchability, an Integration Dashboard, and the New Price Book Workspace

Enhancements to Lightning B2B Commerce include two new components to help manage orders and deliveries. Improved searchability; allows flexibility around marking products searchable, improves messaging for no search results, and bookmarks search results that customers want to retain. Timeout limits ensure that buyers are seeing the most up-to-date information. The Product workspace has been enhanced to provide a bigger picture of your products. The new Pricing workspace provides a one-stop-shop for managing price books. And the integration dashboard helps you manage your integrations in one place.

Salesforce Order Management: Process Exception Management, Return Merchandise Authorizations, and Other Enhancements

Enhancements to Salesforce Order Management include the addition of tools to help you detect and respond to issues—process exceptions—that interrupt normal order processing, a new return order data model for managing return merchandise authorizations, new and updated order summary flows, the ability to configure custom payment methods, and the ability to create order summaries with custom numbers and statuses.

IN THIS SECTION:

Manage Process Exceptions

Get real-time alerts when normal order processing is interrupted, and quickly identify, troubleshoot, and resolve issues to minimize customer impact.

Manage Return Merchandise Authorizations

The new return order data model allows you to build return merchandise authorization workflows for return order tracking and management.

Access New and Updated Order Management Flows

The Create Order Summary flow has been updated and a new Create Process Exception flow has been added.

Create Order Summaries with Custom Numbers and Statuses

When calling the Create Order Summary core action, you can specify values for the order summary number and status instead of changing the default values later.

Handle Custom Payment Methods

Does your Salesforce B2C Commerce storefront accept custom or unusual payment methods? Now you can configure the integration to handle them by creating Gateway Provider Payment Method Type records. Learn how in the *Salesforce Order Management Implementation Guide*.

Manage Process Exceptions

Get real-time alerts when normal order processing is interrupted, and quickly identify, troubleshoot, and resolve issues to minimize customer impact.

Where: This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Why: Order Management lets you automate order processing across every stage in the order lifecycle. However, there are key steps in the order lifecycle during which failures can occur and interrupt order processing. A process exception occurs when there is a processing failure on an order summary and a separate process is required to resolve the issue before order processing can continue.

A process exception can be caused by things like a failed fraud check or payment capture, a lack of available inventory, or a problem with a shipping carrier.

- When a process exception occurs, Order Management creates a process exception notification that displays across the top of the Order Summary page.
- To quickly check for process exceptions across all order summaries, open the Order Summaries list view page from the Navigation bar. If a process exception exists on an order summary, a warning icon displays next to the order summary number in the list view.
- To see a list of all process exceptions (active and resolved), open the Process Exceptions list view page from the Navigation bar.

A new Create Process Exception flow has been added to implement the new Process Exception Management feature. This flow uses the ProcessExceptionEvent platform event trigger to create a Process Exception object record.

SEE ALSO:

Salesforce Help: Process Exception Management (can be outdated or unavailable during release preview)

Manage Return Merchandise Authorizations

The new return order data model allows you to build return merchandise authorization workflows for return order tracking and management.

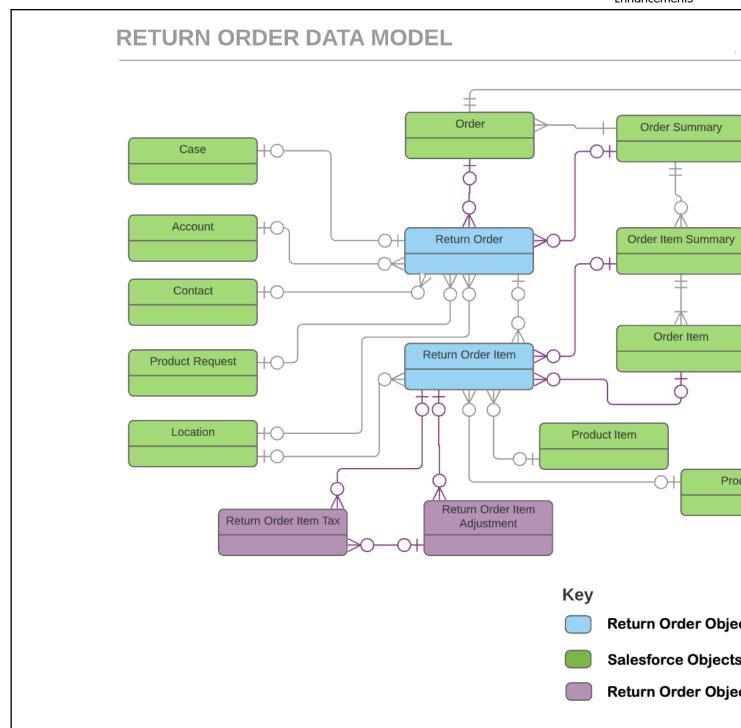
Where: This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: To use the return order data model, you need the Use Return Order and Use Return Order APIs permissions.

Why: The return order data model includes new and updated objects that you can use to build return merchandise authorization workflows. Use these workflows to track and manage return orders from the initiation of a return request to the physical receipt of returned items and on through to refund processing. Using the data model, you can create an unmanaged return order and associate it with an Order Summary. Use the unmanaged return order to track the return and create a change order and credit memo for refund processing when you receive the returned items.

- The Order Summary does not track the state of the return order. However, you can see the status of the return order on the Related tab of the Order Summary.
- The return order does not update the financial information on the Order Summary or associated objects.
- The return order does not update the order item quantities on the Order Summary or associated objects.

Be sure to set up manual processes to keep your order records synchronized with your unmanaged return orders. Or, create a custom workflow using the return order objects to more fully automate return order processing.



SEE ALSO:

Salesforce Help: Return Order Items (can be outdated or unavailable during release preview)

Access New and Updated Order Management Flows

The Create Order Summary flow has been updated and a new Create Process Exception flow has been added.

Lightning B2B Commerce: New Components for Deliveries and Order Summaries, Enhancements to Searchability, an Integration Dashboard, and the New Price Book Workspace

Where: This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Why: The Create Order Summary flow has been updated to use a record type trigger for initiation, instead of a Process Builder flow. This means that you only need to clone the Flow Builder flow for this release. The Process Builder flow included in previous releases is no longer required.

A new Create Process Exception flow has been added to implement the new Process Exception Management feature. This flow uses the ProcessExceptionEvent platform event trigger to create a process exception.

Create Order Summaries with Custom Numbers and Statuses

When calling the Create Order Summary core action, you can specify values for the order summary number and status instead of changing the default values later.

Where: This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Handle Custom Payment Methods

Does your Salesforce B2C Commerce storefront accept custom or unusual payment methods? Now you can configure the integration to handle them by creating Gateway Provider Payment Method Type records. Learn how in the Salesforce Order Management Implementation Guide.

Where: This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Lightning B2B Commerce: New Components for Deliveries and Order Summaries, Enhancements to Searchability, an Integration Dashboard, and the New Price Book Workspace

Enhancements to Lightning B2B Commerce include two new components to help manage orders and deliveries. Improved searchability; allows flexibility around marking products searchable, improves messaging for no search results, and bookmarks search results that customers want to retain. Timeout limits ensure that buyers are seeing the most up-to-date information. The Product workspace has been enhanced to provide a bigger picture of your products. The new Pricing workspace provides a one-stop-shop for managing price books. And the integration dashboard helps you manage your integrations in one place.

IN THIS SECTION:

Let External Users Buy for or Manage Users on External Managed Accounts

Authorize external users to buy for other accounts and manage other account members from external managed accounts.

Use Improved Order Summary Components

It's never too soon to start making improvements. The updated order summary page has four new components: Order Summary Details, Order Summary Details, Order Summary Products. Now the order summary page looks and feels like other Lightning B2B Commerce pages, includes product images, and is mobile responsive and efficient. It also separates shipping charges from the products list. Best part: the components are all easily set up in Experience Builder. What about the old components? We removed them from the palette, but that doesn't affect anything that you built with them. If you delete the components from a page though, you can only add the new versions.

Lightning B2B Commerce: New Components for Deliveries and Order Summaries, Enhancements to Searchability, an Integration Dashboard, and the New Price Book Workspace

Provide Accurate Checkout Information with Time to Live

Timeout limits ensure that your buyers are getting up-to-date product information, including inventory and pricing. Use Time to Live (TTL) to set a timeout limit on your B2B Commerce checkout. Set limits appropriate to your organization and provide users with an easy path back to their cart.

Connect Faster with the B2B Commerce Integration Dashboard

See all your integrations in one place and manage them with a few clicks. An admin can now work in the Commerce app to accomplish what used to require code and developer know-how.

Present Your Delivery Options with the Delivery Method Component

With the new Delivery Method component for B2B Commerce, you can easily present and manage your delivery methods. The component functions as a subflow within the Checkout Flow and is included in the Checkout Flow Template.

Give Buyers Clear Information About Volume Discounts

The Tiered Pricing section of the Product Detail Card component got a makeover. The component property editor section name is now Tiered Discounts to clarify its purpose. And new settings let you enter headers for the quantity and discount rows.

Manage Your B2B Commerce Pricing in the Pricing Workspace

Get a full picture of your pricing strategy by viewing all your price books, or price book entries, at the same time. Use advanced filters, bulk actions, and bulk activation to quickly update multiple products.

See All Your Products in One Place and Take Action on Them

Product Workspace displays all products in your org, regardless of the store that they are associated with. New filter options make it easy to find which stores are associated with your product and easier to tailor your search results.

View Associated Stores and Manage Searchability on Products

Easily view which stores a product is associated with directly on the product record. The Stores tab displays all stores that a product is associated with. You can also mark products as Searchable or Not Searchable in a store from the Stores tab.

Associate Your Buyer Groups to Stores to See Pricing and Entitlements

When a price book or entitlement is associated with a buyer group, make sure to connect that buyer group to your store. Buyer group price books and entitlements are only displayed in the store if the buyer group is also associated with that store. Previously, entitlements and price books were available globally after they were assigned to a buyer group and store assignment wasn't required.

Bookmark Store Search Results

Search components now have a mechanism for retaining results URLs, which means users can search in your store and bookmark their results. When users find the goods, they can get back to them easily without running another search.

Get an Effortless No-Search-Results Experience

The No Search Results page now comes populated with a no-results image and message. Right out of the box, when a search returns no results customers see a meaningful, professional looking message.

Show or Hide Breadcrumbs in Product Search Results

You can decide on the best search experience for your customers with a new configuration setting on the Results Layout component. Use the setting to show or hide navigational breadcrumbs on product search results.

Add All Cart Items, Rename, and Delete Lists (Beta)

A new set of features makes lists more flexible and easier than ever to work with. Buyers can add all cart items to a list in one action, rename their lists, and delete the lists that aren't useful anymore.

Dismiss Cart Errors for Good

When buyers trigger cart errors, they can dismiss them. Previously, when a cart error popped up, it stayed up. Now buyers never see the error again unless another action triggers the same error type.

Let External Users Buy for or Manage Users on External Managed Accounts

Authorize external users to buy for other accounts and manage other account members from external managed accounts.

Where: This feature is new in Lightning Experience, in Unlimited, Enterprise, Performance, and Developer editions.

Who: This change applied to users with a B2B Commerce license.

Why: With Authorized Access, the managing user of an external managed account can manage permission sets for other users, reset passwords, and activate, deactivate, or add members to the target account. They can also make purchases from the target account.

How: The user requires the following permissions to be authorized additional access to the target account:

- Buy For—B2B Commerce User permission.
- Manage Users—Delegated External User Administrator.

When configuring an external managed account, you have the option of selecting **Manage Users** and **Buy For** under Authorized Access. If Manage Users is selected, the managing user can access the Account Management page on the target account and manage members from there. If Buy For is selected, the managing user can make purchases from the target account.

Configure External Managed Account

SEE ALSO:

Allow Buyers to Buy for and Manage Other Accounts with Account Switcher Delegate External User Administration

Use Improved Order Summary Components

It's never too soon to start making improvements. The updated order summary page has four new components: Order Summary Details, Order Summary Details Header, Order Summary Amount, and Order Summary Products. Now the order summary page looks and feels like other Lightning B2B Commerce pages, includes product images, and is mobile responsive and efficient. It also separates shipping charges from the products list. Best part: the components are all easily set up in Experience Builder. What about the old components? We removed them from the palette, but that doesn't affect anything that you built with them. If you delete the components from a page though, you can only add the new versions.

Where: This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Provide Accurate Checkout Information with Time to Live

Timeout limits ensure that your buyers are getting up-to-date product information, including inventory and pricing. Use Time to Live (TTL) to set a timeout limit on your B2B Commerce checkout. Set limits appropriate to your organization and provide users with an easy path back to their cart.

Where: This change applies to Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Why: Using Salesforce APIs, set time limits on your checkout experience. If a buyer user starts the checkout process, but doesn't complete the order, there's a chance that inventory and pricing information changes. Prevent users from finishing their checkout with incorrect information by setting limits on the amount of time a checkout can take. If the user exceeds the time limit, they can return to the cart and start over with fresh callouts to third-party services and a fresh cart.

Connect Faster with the B2B Commerce Integration Dashboard

See all your integrations in one place and manage them with a few clicks. An admin can now work in the Commerce app to accomplish what used to require code and developer know-how.

Where: This change applies to Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Why: Access the Integration Dashboard to see all your active and available integrations and the integration type. Integration types include Apex, Flow, Payment Gateway, and Salesforce Internal. Switch your currently mapped integration with a new integration that you already created. Easily find help when you have integration questions with linked documentation.

How: Navigate to your store landing page. Under **Manage Your Store**, select **Administration** > **Store Integrations**.

Present Your Delivery Options with the Delivery Method Component

With the new Delivery Method component for B2B Commerce, you can easily present and manage your delivery methods. The component functions as a subflow within the Checkout Flow and is included in the Checkout Flow Template.

Where: This change applies to Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

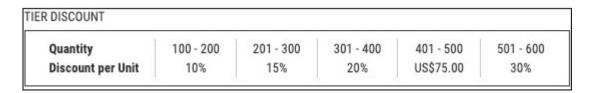
Why: The Delivery Method component displays your delivery methods during checkout.

Give Buyers Clear Information About Volume Discounts

The Tiered Pricing section of the Product Detail Card component got a makeover. The component property editor section name is now Tiered Discounts to clarify its purpose. And new settings let you enter headers for the quantity and discount rows.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Why: Reward your best customers with discounts when they buy in high volumes. As the quantity rises, give them a clear picture of the discounts that they can expect.



How: You can see these changes when you place a new Product Detail Card on a page. For existing placements, you can edit the component and revise headings and row labels in component properties.

Manage Your B2B Commerce Pricing in the Pricing Workspace

Get a full picture of your pricing strategy by viewing all your price books, or price book entries, at the same time. Use advanced filters, bulk activation to quickly update multiple products.

Where: This change applies to Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Why: The Pricing Workspace is a one stop shop for your store pricing. Within the workspace you can:

- Use advanced filters to efficiently find your data. Filter on pricing fields, store assignments, buyer groups, and price adjustments.
- Use bulk actions to quickly manage assignments. Assign multiple price books to a store or buyer group using a single flow.
- Use bulk actions to adjust pricing. Adjust price book entries by percentage and absolute amounts.
- Use bulk activation and deactivation to guickly take price books and price book entries on or offline.

See All Your Products in One Place and Take Action on Them

Product Workspace displays all products in your org, regardless of the store that they are associated with. New filter options make it easy to find which stores are associated with your product and easier to tailor your search results.

Where: This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Why: Because some products are associated with more than one store and can have different searchability settings by store, it's easier to manage a product if you can see the whole picture. Filter the Product hybrid list by Store to view and take actions on all products associated with a specific store. You can also edit filter values rather than removing and replacing them, which makes it easy to tailor your filter search results.

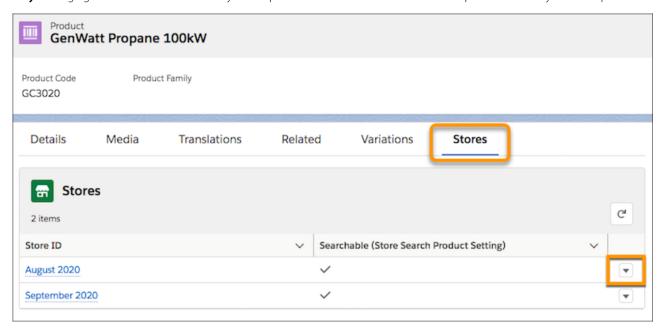
View Associated Stores and Manage Searchability on Products

Easily view which stores a product is associated with directly on the product record. The Stores tab displays all stores that a product is associated with. You can also mark products as Searchable or Not Searchable in a store from the Stores tab.

Where: This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Why: Managing stores and store searchability from a product makes it easier to track where a product is when you must update it.



Associate Your Buyer Groups to Stores to See Pricing and Entitlements

When a price book or entitlement is associated with a buyer group, make sure to connect that buyer group to your store. Buyer group price books and entitlements are only displayed in the store if the buyer group is also associated with that store. Previously, entitlements and price books were available globally after they were assigned to a buyer group and store assignment wasn't required.

Where: This change applies to Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to users with a B2B Commerce license.

Bookmark Store Search Results

Search components now have a mechanism for retaining results URLs, which means users can search in your store and bookmark their results. When users find the goods, they can get back to them easily without running another search.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Get an Effortless No-Search-Results Experience

The No Search Results page now comes populated with a no-results image and message. Right out of the box, when a search returns no results customers see a meaningful, professional looking message.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

How: You can see this change when you create a store. Your existing stores continue to use the old No Search Results page. For the new page, leave the message as is or edit it to add or replace it with your own words or image. We created the message using the HTML Editor component, so revising is a breeze. In Experience Builder, click the HTML Editor component, then in the property editor, click **Edit Markup**.





Note: If you already have a store but you'd like to use the new No Search Results page, use page variations to bring it in. For more information, see Salesforce Help.

SEE ALSO:

Salesforce Help: Set Up a No Search Results Page (can be outdated or unavailable during release preview)

Show or Hide Breadcrumbs in Product Search Results

You can decide on the best search experience for your customers with a new configuration setting on the Results Layout component. Use the setting to show or hide navigational breadcrumbs on product search results.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

How: In Experience Builder, open the Search Results page and select the Results Layout component. In the component property editor, select to show breadcrumbs and make style choices for them. Breadcrumbs are shown by default.

Add All Cart Items, Rename, and Delete Lists (Beta)

A new set of features makes lists more flexible and easier than ever to work with. Buyers can add all cart items to a list in one action, rename their lists, and delete the lists that aren't useful anymore.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.



Note: As a beta feature, My Lists is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use lists at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of lists within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of lists. You can provide feedback and suggestions for lists in the IdeaExchange/X group in the Trailblazer Community B2B Wish List Beta Feedback.

How: From a cart, buyers can add all cart items to a list with the Add All Items to Cart link. From the My Lists page, buyers can select the Rename or Delete action from the row actions menu on a list.

Dismiss Cart Errors for Good

When buyers trigger cart errors, they can dismiss them. Previously, when a cart error popped up, it stayed up. Now buyers never see the error again unless another action triggers the same error type.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Communities: Experience Cloud, New Audience Criteria, Enhanced Build Your Own (LWC) Template, and Better Guest User Security

Our elves have been hard at work this release delivering new features and enhancements. We're revamping our image and introducing our new name: Experience Cloud. Take advantage of more granular audience criteria that let you vary record detail pages based on record fields. The latest Build Your Own (LWC) template is packed with changes, including support for an upgraded version of Lightning Locker, custom URL paths, and SEO. And your data is more secure than ever with the enforcement of several guest user security settings that were introduced in previous releases.



Tip: There's lots of Lightning striking Salesforce these days—Lightning Experience, the Lightning framework, Lightning web components—and it can be tricky to know how it all applies to Communities. Here's the rundown.

Lightning communities use the same underlying technology as Lightning Experience—namely, the Lightning Platform and Lightning components—but you aren't required to enable Lightning Experience to use them.

Also check out the Lightning Components section of the release notes for changes that affect community users.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Move Over Community Cloud, There's a New Kid in Town: Introducing Experience Cloud

Community Cloud lets you build more than just communities—you can also use it to build portals, help centers, forums, sites, mobile apps, and manage content across any digital touchpoint. So to better reflect the many types of experiences you can create, we're now called Experience Cloud. While we're excited to announce this new name to the world, note that the name in the product is remaining Community Cloud for a little bit longer. Use Experience Cloud for all powerful features you've come to cherish with Community Cloud.

Lightning Communities: Field-Based Audience Criteria, Improved Page Management, and Printable View

Use audience criteria based on record fields to vary what users see on a detail page. Organize and manage your community pages in Experience Builder. And use the new printable view to print community record details and lists.

Developer Productivity: Do More, More Easily

Develop communities more efficiently with enhancements to the Build Your Own (LWC) template and improved lightning: has PageReference and lightning: navigation support.

Guest User: Guest User Security Policies Enforced

In Winter '21, Salesforce is enforcing guest user security policies introduced in the past few releases, such as the Secure guest user record access setting. Also, Salesforce is reducing object permissions for guest users.

Security and Sharing: Multi-factor Authentication, Customizable Security Notifications

Enable SMS as a multi-factor authentication method for your external users. Customize the security notifications community members receive when they change their email address.

Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

Move Over Community Cloud, There's a New Kid in Town: Introducing Experience Cloud

Community Cloud lets you build more than just communities—you can also use it to build portals, help centers, forums, sites, mobile apps, and manage content across any digital touchpoint. So to better reflect the many types of experiences you can create, we're now called Experience Cloud. While we're excited to announce this new name to the world, note that the name in the product is remaining Community Cloud for a little bit longer. Use Experience Cloud for all powerful features you've come to cherish with Community Cloud.

Where: This change affects all orgs using Community Cloud.

Lightning Communities: Field-Based Audience Criteria, Improved Page Management, and Printable View

Use audience criteria based on record fields to vary what users see on a detail page. Organize and manage your community pages in Experience Builder. And use the new printable view to print community record details and lists.

IN THIS SECTION:

Prepare Your Community for Upcoming CSP Changes

In Spring '21 (February 2021), the **Allow Inline Scripts and Script Access to Any Third-party Host** CSP setting is being removed. If your community was created before Spring '19 and currently uses this setting, now is the time to prepare.

Manage Your Pages and URLs with the Pages Menu

Now it's easier to organize and restructure your pages and page URLs in Experience Builder. Edit your pages to suit your content needs with the Pages menu and see these updates in your live site's URL.

Apply Audiences to Record Detail Pages with Record-Based Criteria

You can now vary what people see on a record detail page using audience criteria based on record fields. For example, you can display different theme layouts when someone is looking at a coffee machine or a box of tea, or different pages for high-value and low-value opportunities. Also, we moved record criteria from the advanced section into the main body of the editor, so you can easily combine it with user criteria to create custom formulas.

Print Lightning Community Record Details and Lists with Printable View

Use the Printable View button on record details and record lists in Lightning communities to generate a condensed, minimalist view for printing.

Package Tile Menus in Bolt Solutions

You can now package a tile menu with Bolt Solutions, and distribute them. All the properties of the tile menu are included in the package, but admins have to associate a navigation menu to the tile menu after the Bolt Solution is installed.

Let External Users Manage Other Users with External Managed Accounts

Allow external users to switch to other external accounts using the Account Switcher component. And authorize access to manage the other accounts' users.

Topic ID Field Added Back to Topics Components

In Spring '20, we removed the Topic ID field from the Related Topics List, Topic Description, and Topic Metrics components. In Winter '21, we're bringing the dynamically generated field back for those components.

Prepare Your Community for Upcoming CSP Changes

In Spring '21 (February 2021), the **Allow Inline Scripts and Script Access to Any Third-party Host** CSP setting is being removed. If your community was created before Spring '19 and currently uses this setting, now is the time to prepare.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Why: The Allow Inline Scripts and Script Access to Any Third-party Host CSP option allows access to all third-party hosts and provides no added security. So to improve security for all communities, the setting is being removed in Spring '21.

To prepare for that change and ensure that you have adequate time for testing, we recommend switching your community to a more secure option now. You can choose from the following security levels.

Security Level	Description
Strict CSP: Block Access to Inline Scripts and All Hosts	 Provides maximum security. Blocks the execution of all inline scripts and all requests for remote JavaScript files. Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. Lightning Locker is turned on.
Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts	 Provides moderate security. Allows inline scripts to run in your site. Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. Allows you to turn off Lightning Locker.

SEE ALSO:

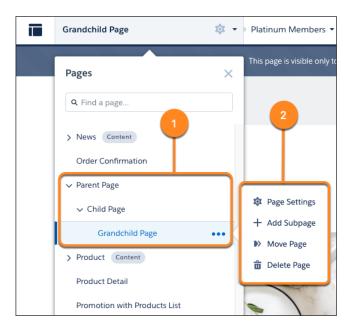
Salesforce Help: CSP and Lightning Locker in Lightning Communities (can be outdated or unavailable during release preview)

Manage Your Pages and URLs with the Pages Menu

Now it's easier to organize and restructure your pages and page URLs in Experience Builder. Edit your pages to suit your content needs with the Pages menu and see these updates in your live site's URL.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

How: In Experience Builder, navigate to the Pages menu panel. Create your own page hierarchy (1) in seconds when you open the Page Action menu (2) and click **Add Subpage**.



Build out your site's hierarchy with up to six page levels by nesting a standard, object, or content page under an existing page.

Manage the URLs for each page after creating your page hierarchy. Click **Page Settings** from the Page Action menu to edit the page's properties, including the page name and URL. You can change your page hierarchy at any time by clicking **Move Page** from the Page Action menu. No need to worry about the URL because your subpage URL automatically updates to reflect your changes.



The site URL for each page reflects the structure you set up in Experience Builder when you share the live site with your users.



Apply Audiences to Record Detail Pages with Record-Based Criteria

You can now vary what people see on a record detail page using audience criteria based on record fields. For example, you can display different theme layouts when someone is looking at a coffee machine or a box of tea, or different pages for high-value and low-value opportunities. Also, we moved record criteria from the advanced section into the main body of the editor, so you can easily combine it with user criteria to create custom formulas.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Why: Record-based criteria has been around for a while, but was limited to only one field type: record type. In Winter '21, we expanded the types of fields that can be used to vary a record detail experience to offer you a more powerful option. As a result, many of the fields on common objects, like opportunities, can be used as the basis for varying the record detail experience.

To create the opportunity example, select the value field on an opportunity record, and assign an amount. Using the Greater Than operator, assign a minimum value, and apply the audience to a page. Opportunities with a value higher than what was assigned see one version of the page while all others see a different version.

You can create record-based criteria using these objects:

- Account
- Asset
- Campaign
- Case
- Contact
- Contract
- Lead
- Opportunity
- Product2
- ProductCategory
- Quote
- Custom Objects
- Any object with at least one record type (only some fields available)

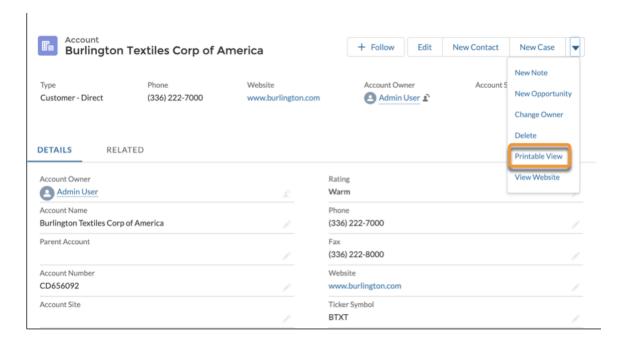
Print Lightning Community Record Details and Lists with Printable View

Use the Printable View button on record details and record lists in Lightning communities to generate a condensed, minimalist view for printing.

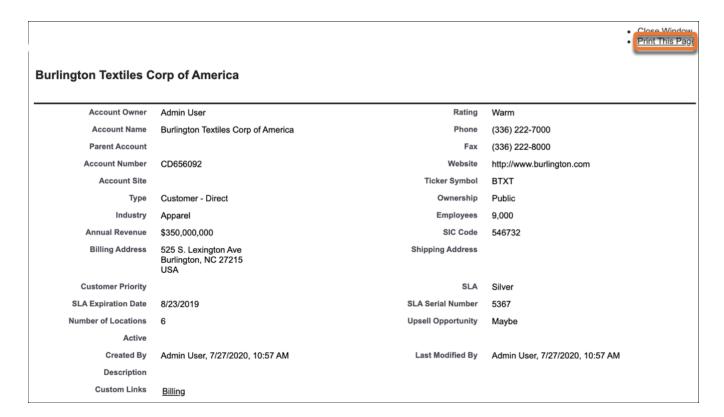
Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Who: Printable view is available to authenticated members of communities and portals. It's not available to guest users.

How: Select Printable View from a list or record detail.



The columns and fields shown on the printable view reflect your page layout or related list preferences.



Printable View supports these objects for record detail:

- Accounts
- Campaigns

- Cases
- Contacts
- Contracts
- Custom objects
- Leads
- Opportunities
- Orders

Printable View supports these objects for record lists:

- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Solutions

Printable View isn't available on the Recently Viewed lists or for related lists. Search results or related list quick filters aren't used when generating the printable view.

Package Tile Menus in Bolt Solutions

You can now package a tile menu with Bolt Solutions, and distribute them. All the properties of the tile menu are included in the package, but admins have to associate a navigation menu to the tile menu after the Bolt Solution is installed.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Let External Users Manage Other Users with External Managed Accounts

Allow external users to switch to other external accounts using the Account Switcher component. And authorize access to manage the other accounts' users.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Who: This change applies to external users. Users with the Delegated External User Administration permission can managed other users.

Why: Configure an external managed account to designate a user who can switch to another account. If the account uses a Builder component that contains the attribute accountld, you can use the value {!CurrentUser.effectiveAccountId} for that attribute to update component information when Account Switcher is used.

To drive new behavior based on the account switcher, create a custom component and use the account ID {!CurrentUser.effectiveAccountId}.

With Authorized Access, the managing user of an external managed account can manage permission sets for other users, reset passwords, and activate, deactivate, or add members to the target account.

How: When configuring an external managed account, you have the option of selecting **Manage Users** under Authorized Access. After you select the access and the external managed account is saved, the managing user can access Account Management on the target account. They can manage members of the target account from there.

Topic ID Field Added Back to Topics Components

In Spring '20, we removed the Topic ID field from the Related Topics List, Topic Description, and Topic Metrics components. In Winter '21, we're bringing the dynamically generated field back for those components.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Developer Productivity: Do More, More Easily

Develop communities more efficiently with enhancements to the Build Your Own (LWC) template and improved lightning: has PageReference and lightning: navigation support.

IN THIS SECTION:

Build Fast, Efficient Experiences with the LWC-Based Template (Pilot)

Develop communities that load quickly and scale well using the Build Your Own (LWC) template. Based on Lightning Web Components (LWC), a programming model that delivers exceptional performance, this lightweight template supports fully custom solutions. The template, now available as a pilot, includes some changes since the previous release.

Communities Now Support lightning:hasPageReference and Default Field Values in lightning:navigation

Communities now support lightning:hasPageReference for action overrides, and default field values in lightning:navigation. Previously, default field values weren't supported in lightning:navigation.

Build Fast, Efficient Experiences with the LWC-Based Template (Pilot)

Develop communities that load quickly and scale well using the Build Your Own (LWC) template. Based on Lightning Web Components (LWC), a programming model that delivers exceptional performance, this lightweight template supports fully custom solutions. The template, now available as a pilot, includes some changes since the previous release.

Where: This change applies to communities accessed through Lightning Experience and Salesforce Classic. The template is available as a developer preview in Developer editions, or as a pilot program in Enterprise, Performance, and Unlimited editions.



Note: We provide the Build Your Own (LWC) template to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance.

Alternatively, you can access a developer preview of the template in Developer editions without signing up for the pilot program. Developer preview participants can create up to 100 sites, whereas pilot participants can create only two.

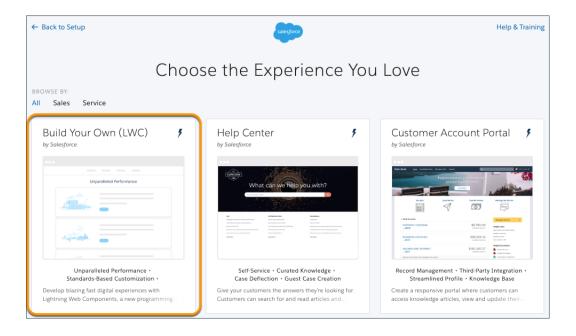
Regardless of edition, the template isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for the template in the Lightning Web Runtime Communities group in the Trailblazer Community.

Why: Since the previous release, we added support for:

- An upgraded version of Lightning Locker that supports cross-namespace communication
- Custom URL paths for unauthenticated sites, meaning no more /s cluttering up your site's URL—for example, https://mycustomdomain.com/mypage
- Accessibility features, including screen readers and F6 navigation, which makes it easier to navigate web pages via keyboard
- Search engine optimization (SEO) by including a sitemap that lets search engines crawl public pages
- A new HTML Editor component that lets you add and edit custom markup
- The following @salesforce modules:
 - @salesforce/client
 - @salesforce/customPermission
 - @salesforce/userPermission
- Tip: Build Your Own (LWC) is a minimal template that provides few components and only the most essential pages. The template is best suited to developers who are comfortable developing Lightning web components and working with Salesforce DX, User Interface API, and Apex.

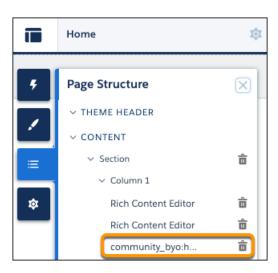
How: To start using the template, from Setup, in the Quick Find box, enter *Communities Settings*, and then select **Communities Settings**. Select **Enable the Build Your Own (LWC) template**, and save your changes.

After you enable the template, it appears in the community creation wizard.



(1) Important: For previous developer preview participants, you must remove two old components to ensure that the Home and Error pages render correctly.

In Experience Builder, open the Home page, and delete the **community_byo:home** component from the Page Structure pane. For the Error page, delete the **community_byo:error** component.



Communities Now Support lightning: hasPageReference and Default Field Values in lightning:navigation

Communities now support lightning: has PageReference for action overrides, and default field values in lightning: navigation. Previously, default field values weren't supported in lightning: navigation.

Where: This change applies to all communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Guest User: Guest User Security Policies Enforced

In Winter '21, Salesforce is enforcing guest user security policies introduced in the past few releases, such as the Secure guest user record access setting. Also, Salesforce is reducing object permissions for guest users.

IN THIS SECTION:

Secure Guest User Record Access Can't Be Disabled

The Secure guest user record access setting was enabled in Summer '20, but could still be disabled during that release. To safeguard your Salesforce org's data, in Winter '21, this setting is enabled in all orgs with communities or sites and can't be disabled. The Secure guest user record access setting enforces private org-wide defaults for guest users and requires that you use guest user sharing rules to open up record access. You also can't add guest users to groups or queues or grant guest users record access through manual sharing or Apex managed sharing.

Automatically Assign Records Created by Guest Users to a Default Owner (Previously Released Update)

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. The Assign new records created by guest users to the default owner setting is automatically enabled in all orgs with communities, and can't be disabled. When a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Reduce Object Permissions for Guest Users

With the Winter '21 release, Salesforce is disabling the View All, Modify All, edit, and delete object permissions for guest users in existing orgs. These permissions are removed from orgs created in Winter '21 and later. For existing orgs, reduce object permissions for guest users if they have View All, Modify All, edit, or delete permissions on a standard or custom object.

Opt Out of Enforcing Guest User Object Permission Changes (Previously Released Update)

For Salesforce orgs created before Winter '21, this update opts your org out of enforcing guest user object permission changes aimed at increasing your data security.

View All Users and Other Permissions Removed in Guest User Profiles (Previously Released Update, Enforced)

Guest users typically don't need access to view all users in a Salesforce org, so to promote data security, we disabled the View All Users permission in guest user profiles with the Summer '20 release. The permission is removed from all guest user profiles with the Winter '21 release. To enhance security, we also removed these permissions from the guest user profile: Enable UI Tier Architecture, Remove People from Direct Messages, View Topics, and Send Non-Commercial Email.

Let Guest Users See Other Members of This Community Setting Disabled

With the Winter '21 release, the setting, Let guest users see other members of this community, is turned off by default in all Salesforce orgs that have active communities with at least one community created before the Winter '20 release.

Improved Security for Managed Topic Images

Managed topic images that were uploaded before Winter '21 are stored as documents and are public. Guest users can see these featured and navigational topic images even in private and unpublished communities. To improve security, new images associated with featured and navigational topics are stored as asset files and are private. Ensure that guest users in your community can see these new images.

Override Entity Permissions When Using <apex:inputField>

The new ignoreEditPermissionForRendering attribute on <apex:inputField> allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits. This override affects all users but is intended to be used only for guest users. This attribute works only with a custom controller in without sharing mode.

Secure Guest User Record Access Can't Be Disabled

The Secure guest user record access setting was enabled in Summer '20, but could still be disabled during that release. To safeguard your Salesforce org's data, in Winter '21, this setting is enabled in all orgs with communities or sites and can't be disabled. The Secure guest user record access setting enforces private org-wide defaults for guest users and requires that you use guest user sharing rules to open up record access. You also can't add guest users to groups or queues or grant guest users record access through manual sharing or Apex managed sharing.

Where: This change applies to orgs with active communities and sites in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

When: The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

SEE ALSO:

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

Summer '20 Release Note: Secure Guest Users' Org-Wide Defaults and Sharing Model (Previously Released Security Alert, Enforced)

Automatically Assign Records Created by Guest Users to a Default Owner (Previously Released Update)

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. The Assign new records created by guest users to the default owner setting is automatically enabled in all orgs with communities, and can't be disabled. When a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Where: This change applies to orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

How: In newly created communities, Salesforce automatically assigns the user who created the community as the default owner of all records created by guest users. Change the default owner in the Administration workspace of your community, under Preferences.



Note: Existing records in the org that are already owned by guest users aren't impacted by this change. However, to improve data security, we still recommend transferring ownership of records owned by guest users to another user in your org.

SEE ALSO:

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

Reduce Object Permissions for Guest Users

With the Winter '21 release, Salesforce is disabling the View All, Modify All, edit, and delete object permissions for guest users in existing orgs. These permissions are removed from orgs created in Winter '21 and later. For existing orgs, reduce object permissions for guest users if they have View All, Modify All, edit, or delete permissions on a standard or custom object.

Where: This change applies to all Salesforce orgs created before the Winter '21 release, with one or more standard or custom objects with View All, Modify All, edit, or delete permissions enabled for guest users. Orgs created in Winter '21 and after don't allow these permissions.

How: If the Reduce Object Permissions for Guest Users security alert appears in your org, you must act to secure your org data. If you see the security alert, your org data could be exposed to guest users because you've one or more standard or custom objects with View All, Modify All, edit, or delete permissions that are enabled for guest users. If you see the security alert in your org, follow the step-by-step recommendations.

Salesforce strongly recommends that you closely check your org's guest user profiles, permission sets, and permission set groups to ensure that the settings aren't enabled for any standard or custom objects. If the settings are enabled, disable them and test your org's configuration before the Winter '21 release.

Important: If a permission set or permission set group is assigned to the guest user and grants Modify All, View All, edit, or delete, to custom objects, or Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement, then the guest user is removed from the permission set or permission set group. If any other permissions were granted using the same permission set or permission set group, the guest user can't access them. If you have permission sets or permissions set groups that have Modify All, View All, edit, or delete permissions on objects, as well as other permissions, we recommend that you clone them and remove Modify All, View All, edit, or delete permissions. You can then reassign the permission sets and permission set groups to guest users. If your guest user is removed with the Winter '21 release, you can simply reassign the guest user to the permission set or permission set group. But starting with the Spring '21 release, you can no longer assign Modify All, View All, edit, or delete permissions to guest users, even with a permission set or permission set group.

In orgs created in Winter '21 and later, these permissions are permanently removed and can't be enabled for guest uses.

SEE ALSO:

Opt Out of Enforcing Guest User Object Permission Changes (Previously Released Update)

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

Opt Out of Enforcing Guest User Object Permission Changes (Previously Released Update)

For Salesforce orgs created before Winter '21, this update opts your org out of enforcing guest user object permission changes aimed at increasing your data security.

Where: This update applies to all Salesforce Sites (formerly Force.com Sites), Site.com sites, and communities that have guest user access enabled.

Why: Activating the Opt Out of Enforcing Guest User Object Permission Changes update keeps the following permissions unchanged. If they are enabled, they remain enabled, and if they are disabled, they remain disabled.

- Edit, delete, Modify All Data, and View All Data for custom objects.
- Edit, delete, Modify All Data, and View All Data for the following standard objects: Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement.

These permissions are scheduled to be turned off for custom objects and the previous standard objects with the rollout of the Winter '21 release. But you can still enable them to meet your business needs. After your org updates with the Winter '21 release, you can no longer activate this update.

If you opt out, your opt-out period is only valid for the Winter '21 release. With the Spring '21 release, these permissions are permanently removed for guest users, and can no longer be enabled.

Salesforce strongly recommends that you closely check your org's guest user profiles, permission sets, and permission set groups to ensure that the settings aren't enabled for any standard or custom objects. If the settings are enabled, disable them, and test your org's configuration before the Winter '21 release. Salesforce understands that some customers require more time to comply with removing the permissions from guest user profiles. This update gives you ample time to get ready.

Important: If a permission set or permission set group is assigned to the guest user and grants edit, delete, Modify All Data, or View All Data to custom objects, or Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement, then the guest user is removed from the permission set or permission set group. If any other permissions were granted using the same permission set or permission set group, the guest user can no longer access them. Use this opt-out to stop the removal of the guest user from permission sets or permission set group. If your guest user is removed with the Winter '21 release, you can simply reassign the guest user to the permission set or permission set group. But starting with the Spring '21 release, you can no longer assign Modify All Data, View All Data, edit, or delete permissions to guest users, even with a permission set or permission set group.

SEE ALSO:

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

View All Users and Other Permissions Removed in Guest User Profiles (Previously Released Update, Enforced)

Guest users typically don't need access to view all users in a Salesforce org, so to promote data security, we disabled the View All Users permission in guest user profiles with the Summer '20 release. The permission is removed from all guest user profiles with the Winter '21 release. To enhance security, we also removed these permissions from the guest user profile: Enable UI Tier Architecture, Remove People from Direct Messages, View Topics, and Send Non-Commercial Email.

Where: This change applies to orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

When: The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

SEE ALSO:

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

Let Guest Users See Other Members of This Community Setting Disabled

With the Winter '21 release, the setting, Let guest users see other members of this community, is turned off by default in all Salesforce orgs that have active communities with at least one community created before the Winter '20 release.

Where: The update is visible in Salesforce orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

Why: The community-specific setting, Let guest users see other members of this community, lets admins control guest user visibility independently from other community user visibility settings.

Depending on your security configuration, this setting could allow a guest user, essentially anyone on the internet, to access community users' personally identifying information. This information can include first and last name, email, custom, and other fields.

To protect your customer data and privacy, Salesforce is turning off the Let guest users see other members of this community setting for all communities.

Depending on your business needs, enabling this setting and allowing guest users to see one another could be required for your site to function properly. Therefore, we ask you to reassess and validate whether your business requires this setting. We encourage you to work towards modifying your site's customization to allow this setting to be disabled. Limiting guest user visibility to other community uses is a Salesforce security best practice.

If you already turned off this setting for all your communities and tested your implementation, then you aren't impacted by the Winter '21 release.

To turn the setting back on, access your community's Workspaces, and enable the setting under **Administration** > **Preferences**.

Improved Security for Managed Topic Images

Managed topic images that were uploaded before Winter '21 are stored as documents and are public. Guest users can see these featured and navigational topic images even in private and unpublished communities. To improve security, new images associated with featured and navigational topics are stored as asset files and are private. Ensure that guest users in your community can see these new images.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

How: To allow guest users to see new featured and navigational topic images in your community, select **Let guest users view asset files and CMS content available to the community** in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, community branding, and account branding.

If you don't want images that were uploaded before Winter '21 to be public, delete them and upload them again in **Content Management** > **Topics** in Experience Workspaces.

Override Entity Permissions When Using <apex:inputField>

The new ignoreEditPermissionForRendering attribute on <apex:inputField> allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits. This override affects all users but is intended to be used only for guest users. This attribute works only with a custom controller in without sharing mode.

Where: This change applies to Salesforce orgs in Enterprise, Performance, Unlimited, and Developer editions.

When: This change was available first in Winter '21 and then back-ported to Summer '20.

How: This attribute bypasses entity edit permissions and field-level security edit checks, so any form field that uses <apex:inputField> with this attribute is open for edit. To validate fields or block edit access when using this attribute, use additional checks in the page's custom Apex controller.



Warning: Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

Security and Sharing: Multi-factor Authentication, Customizable Security Notifications

Enable SMS as a multi-factor authentication method for your external users. Customize the security notifications community members receive when they change their email address.

IN THIS SECTION:

Let Users Authenticate by SMS

You can now allow your external users to use SMS as a multi-factor authentication method. No need for downloading special apps—verification can be as easy as getting a text message.

Customize Notifications for Changing Email Addresses

Use customizable email templates for the security notifications customers receive when they change their email address.

Let Users Authenticate by SMS

You can now allow your external users to use SMS as a multi-factor authentication method. No need for downloading special apps—verification can be as easy as getting a text message.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

SEE ALSO:

Let Your Community Users, Customers, and Partners Verify Their Identities with SMS

Customize Notifications for Changing Email Addresses

Use customizable email templates for the security notifications customers receive when they change their email address.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

SEE ALSO:

Put Your Own Spin on Your Community's Email Address Change Verification Emails

Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

IN THIS SECTION:

No Longer Testing Lightning Community Features on Internet Explorer 11

Support for accessing Lightning communities with Internet Explorer 11 ends on December 31, 2020. But don't worry—there's no difference for visitors who use the browser in the short term. However, because Community Cloud no longer tests new features on Internet Explorer 11, your Lightning community can begin to function differently than expected over time.

Trusted Site Paths for Lightning Communities Are Case-Sensitive

We fixed an issue where the URL path for a trusted site in a Lightning community was used incorrectly in an all lowercase format. We now use the URL path exactly as you enter it. This change avoids the issue of a trusted site being unexpectedly blocked.

Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Previously Released Update)

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

User Settings and User Profile Summary & Image Components Were Replaced

Because of updated versions of the components, the old User Settings and the User Profile Summary & Image components are deprecated. For the same functionality, and a bunch more features, use Customizable User Settings, User Profile Summary, and User Profile Image components instead.

Enable Article Sharing for High-Volume Community Users

High-volume community users can now use sharing sets and share groups to share Knowledge articles.

Personalize Communities with Code Settings for Embedded Chat and Channel Menu

Invite customers to chat in your Salesforce community for a more personalized experience. In Experience Builder, you can add Code Setting Name property to the Embedded Chat component to load custom JavaScript that appear as pop-up invitations for visitors.

The Last Modified Date Is Back

For a while now, search results for Classic Knowledge appeared with the words "Last Modified" but without a date. Now you also see the last modified date and time on search results.

No Longer Testing Lightning Community Features on Internet Explorer 11

Support for accessing Lightning communities with Internet Explorer 11 ends on December 31, 2020. But don't worry—there's no difference for visitors who use the browser in the short term. However, because Community Cloud no longer tests new features on Internet Explorer 11, your Lightning community can begin to function differently than expected over time.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Why: Over the next two releases, we recommend that your users switch to a supported browser. To notify users of this requirement, from Setup, in the Quick Find box, enter *Communities Settings*, then click **Communities Settings**, and ensure that **Display warning for unsupported browsers in Communities** is selected.

This setting displays a notification to users who access their Lightning community with an unsupported browser, asking them to update their version or use another browser.



Note: Internet Explorer 11 is still supported for Salesforce Tabs + Visualforce communities.

SEE ALSO:

Salesforce Help: Browser Support for Communities (can be outdated or unavailable during release preview)

Trusted Site Paths for Lightning Communities Are Case-Sensitive

We fixed an issue where the URL path for a trusted site in a Lightning community was used incorrectly in an all lowercase format. We now use the URL path exactly as you enter it. This change avoids the issue of a trusted site being unexpectedly blocked.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Why: Previously, if you saved a trusted site with a URL path of example.com/folder/other/MyScript.js, the trusted site was used as example.com/folder/other/myscript.js (all lowercase).

We now use the expected trusted site URL path of example.com/folder/other/MyScript.js.

SEE ALSO:

Salesforce Help: Select a Security Level in Lightning Communities (can be outdated or unavailable during release preview)

Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Previously Released Update)

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

Where: This change applies to all communities and portals accessed through Lightning Experience and Salesforce Classic in Performance, Enterprise, Unlimited, and Developer editions.

Who: This change applies to all orgs using standard external profiles:

- Customer Community Plus
- Customer Community Plus Login
- Customer Portal Manager
- Customer Portal Manager Custom
- Customer Portal Manager Standard
- Ideas Only Portal
- Limited Customer Portal Manager Custom
- Limited Customer Portal Manager Standard
- Overage Customer Portal Manager Custom
- Overage Customer Portal Manager Standard
- Bronze Partner
- External Apps Plus Login
- External Apps Plus Member
- Gold Partner
- Partner
- Partner Community
- Partner Community Login
- Silver Partner
- Authenticated Website
- CSP Lite Portal
- Customer Community

- Customer Community Login
- External Apps Login
- External Apps Member
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website
- Overage High Volume Customer Portal
- Platform Portal

How: Activate this update if you're currently using one of the standard external profiles for login, self-registration, or user creation in communities or portals. After the Spring '21 release, users in your org who are assigned to external standard profiles can no longer log into communities.

From Setup, enter *Release Updates* in the Quick Find box, then select **Release Updates**. For Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals, click **Activate**.



Note: Enabling the Allow using standard external profiles for self-registration and user creation setting is not a Salesforce security best practice. We strongly recommend that you clone standard external profiles, and change object permissions to meet your business needs. If you've already enabled the setting in your org, this update is shown as activated.

User Settings and User Profile Summary & Image Components Were Replaced

Because of updated versions of the components, the old User Settings and the User Profile Summary & Image components are deprecated. For the same functionality, and a bunch more features, use Customizable User Settings, User Profile Summary, and User Profile Image components instead.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Enable Article Sharing for High-Volume Community Users

High-volume community users can now use sharing sets and share groups to share Knowledge articles.

Where: This change applies to communities in Enterprise, Essentials, Performance, Developer, and Unlimited editions, using Lightning Knowledge. Not available in Salesforce Classic.

How: To share articles with high-volume community users, first turn on standard Salesforce sharing for Knowledge. From Setup, find the Knowledge Settings page, and click **Edit**. Under Sharing Settings, enable **Use standard Salesforce sharing**, and click **Save**. After standard sharing is enabled, you can use sharing sets and share groups to share articles.

SEE ALSO:

Use Knowledge Sharing with Guest Users and High-Volume Community Users

Personalize Communities with Code Settings for Embedded Chat and Channel Menu

Invite customers to chat in your Salesforce community for a more personalized experience. In Experience Builder, you can add Code Setting Name property to the Embedded Chat component to load custom JavaScript that appear as pop-up invitations for visitors.

Where: This change applies to Lightning communities accessed through Lightning Experience in Essentials, Professional, Performance, and Unlimited editions.

SEE ALSO:

Customize Communities with Code Settings for Embedded Chat and Channel Menu

The Last Modified Date Is Back

For a while now, search results for Classic Knowledge appeared with the words "Last Modified" but without a date. Now you also see the last modified date and time on search results.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Salesforce CMS: Content Delivery Network, Local Content Import, and Folders

Share your public content with a content delivery network (CDN), import images and documents from your local drive to Salesforce CMS, and organize your CMS content with folders.

IN THIS SECTION:

Serve CMS Content with a Content Delivery Network (CDN)

Deliver Salesforce CMS content to your users with higher performance than ever through a CDN. A CDN is a distributed group of servers that work together to deliver your content quickly and efficiently. Readily connect content to your sites through Community Cloud or to custom applications through public channels. And conveniently share your email marketing content and templates from Salesforce CMS with Marketing Email in Lightning.

Import Local Images and Documents to Salesforce CMS

Import content such as images and documents into a workspace in Salesforce CMS directly from your .zip archive, without having to reference it from a web source.

Organize Salesforce CMS Content with Folders

Create and edit folders to easily organize content in your Salesforce CMS workspace, and share links to folders with others in your org.

Salesforce CMS Now Supports Knowledge Articles in the CMS Collections Component

Create a Knowledge collection from a public list view and display the collection with the Salesforce CMS Collection component.

Add Content More Easily with the Enhanced Rich Text Editor

Enjoy a larger text editing block to copy and paste tables, and view videos in full screen.

Salesforce CMS Apps and Tabs Are Enabled by Default

The Salesforce CMS app and its tabs are now enabled by default in the App Launcher for new orgs and all standard user profiles. Previously, you had to manually enable them for your users.

Filter by Content Type in Salesforce CMS

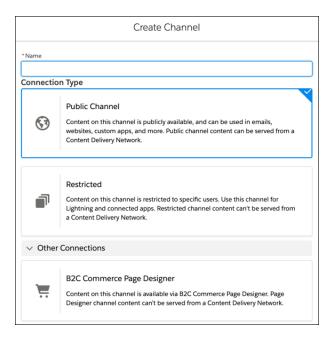
Quickly find content in the Salesforce CMS app, single items, or collections with a content type filter and search ability for a filtered list.

Serve CMS Content with a Content Delivery Network (CDN)

Deliver Salesforce CMS content to your users with higher performance than ever through a CDN. A CDN is a distributed group of servers that work together to deliver your content quickly and efficiently. Readily connect content to your sites through Community Cloud or to custom applications through public channels. And conveniently share your email marketing content and templates from Salesforce CMS with Marketing Email in Lightning.

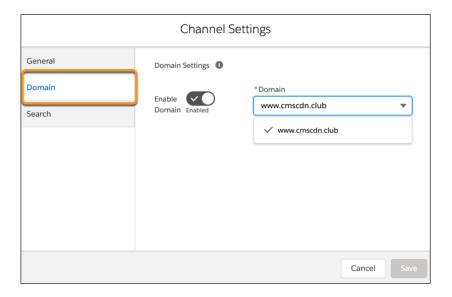
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: Serve your content from a CDN such as our CDN partner, Akamai, or use one of your own. To create a public channel, open the CMS Channels page in the Salesforce CMS app, click **Create Channel**, and select **Public Channel**.



Then, on the CMS Channels page, click > **Edit** beside your public channel.

In the Channel Settings window, you can configure a domain that links content from your public channel to the CDN and seamlessly deliver content to your users.



Tip: To serve content to your website through Community Cloud, configure a CDN for your community in Setup instead of in the Salesforce CMS app.

Share email marketing content and templates from Salesforce CMS with the Lightning Content Builder. Add a domain, create, or select a workspace and channel in CMS. Then, designate a channel to use with the Lightning Content Builder.

SEE ALSO:

Source Images from Salesforce CMS for Emails

Salesforce Help: Salesforce CMS Content Delivery Network (CDN) Overview (can be outdated or unavailable during release preview)

Import Local Images and Documents to Salesforce CMS

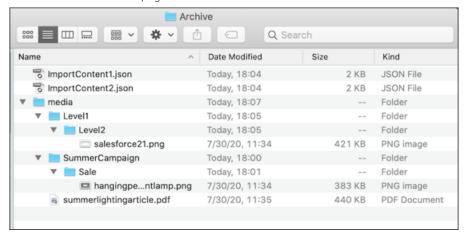
Import content such as images and documents into a workspace in Salesforce CMS directly from your .zip archive, without having to reference it from a web source.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To import content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

How: On your computer, create a folder named media and save local content for import in this folder. When you enter the content details into a JSON file, use the ref attribute to reference the local image or document filename and its location inside of the media folder. For example, if an image is called salesforce 21.png and is nested in a folder called Level 2, add the reference as

Level1/Level2/salesforce21.png. Add the media folder to the location of the JSON files and create a .zip archive.



Note: You can still use the url attribute with a path to the file to import images from a web source. At least one source, ref or url, is required and only one can be used per content object.

Here's an example of the JSON structure for importing images.

```
{
"content": [
   {
   "type": "cms image",
   "urlName": "lampplus",
    "status": "Draft",
    "body": {
       "title": "Hanging Pendant Lamp with Bluetooth Accessibility",
        "altText" : "Hanging Pendant Lamp with Bluetooth Accessibility",
        "source" : {
            "ref": "SummerCampaign/Sale/hangingpendantlamp.png"
        }
   },
   "type": "cms image",
   "urlName": "lampplus",
   "status": "Published",
   "body": {
       "title": "Modern Table Lamps Set of 2 with USB Gold Metal for Living Room Bedroom
Bedside",
       "altText" : "Modern Table Lamps Set of 2 with USB Gold Metal for Living Room Bedroom
Bedside",
        "thumbUrl": "https://myimageurl.com/images/g/wP8AAOSw3S1ct-iC/s-1640.jpg",
            "url": "https://myimageurl.com/images/g/wP8AAOSw3S1ct-iC/s-1640.jpg"
        }]
```

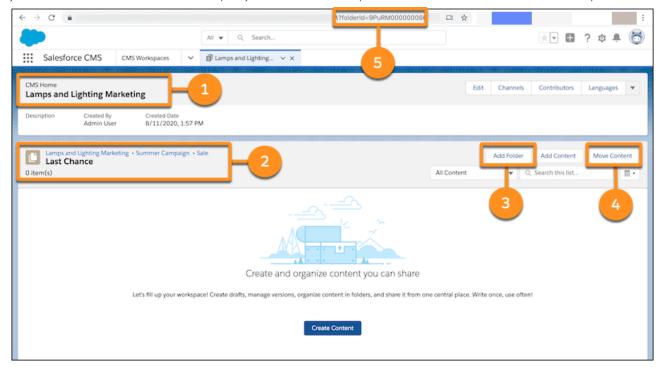
Organize Salesforce CMS Content with Folders

Create and edit folders to easily organize content in your Salesforce CMS workspace, and share links to folders with others in your org.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To create and edit folders, you must have a content admin role in that CMS workspace or be a Salesforce admin.

Why: Now it's easier to organize all content types into folders. In your workspace (1) create folders with a hierarchy of up to five levels (2) with the click of a button (3). Edit and rename folders to fine-tune your CMS, and delete empty folders you no longer need. Add content directly to folders and move content within folders (4). Each folder has a unique folder ID that appears in the URL (5). This means you can bookmark the URL to find a folder quickly and share the link to specific folders with other members of the workspace.



Salesforce CMS Now Supports Knowledge Articles in the CMS Collections Component

Create a Knowledge collection from a public list view and display the collection with the Salesforce CMS Collection component.

Where: This change applies to Lightning communities using Salesforce CMS, accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To create Salesforce CRM collections for Salesforce CMS, you must have a content admin role in the community or be a Salesforce admin.

How: First, make sure Knowledge is enabled in your org. In Salesforce CMS add a CRM connection for Knowledge to allowlist knowledge articles. Then create a CRM collection for Salesforce CMS and curate a collection of knowledge articles by referencing a knowledge list view. Use that collection in the CMS Collection component.



Note: Knowledge list views can support translations of knowledge articles. When you curate the collection make sure to complete the language field. Try personalizing your Knowledge collection for different audiences and create personalized components.

SEE ALSO:

Add CRM Connections in Salesforce CMS

Create Salesforce CRM Collections for Salesforce CMS

Create Personalized Components

Personalization Using Audience Targeting

Add Content More Easily with the Enhanced Rich Text Editor

Enjoy a larger text editing block to copy and paste tables, and view videos in full screen.

Where: This change applies Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To create and edit content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

Why: Previously, videos weren't viewable in full screen after being added to the rich text editor. Now you can view videos in full screen in unpublished and published content. And when you publish the content, your users can view the video in full screen too.

Salesforce CMS now supports videos from the provider Appinium in published content.

If you ever wanted the rich text editor to be a bit bigger and the ability to copy and paste tables, you're in luck! With the latest enhancements, the editor increases in size as you add content, and you can also copy and paste tables.

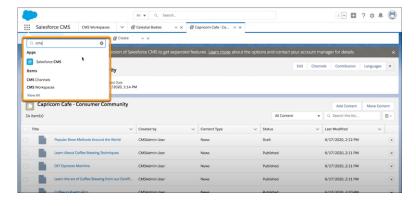
Salesforce CMS Apps and Tabs Are Enabled by Default

The Salesforce CMS app and its tabs are now enabled by default in the App Launcher for new orgs and all standard user profiles. Previously, you had to manually enable them for your users.

Where: This change applies Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: All standard user profiles.

Why: The Salesforce CMS app and tabs, such as CMS Channels and CMS Workspaces, are easier than ever to find with a searchable list.



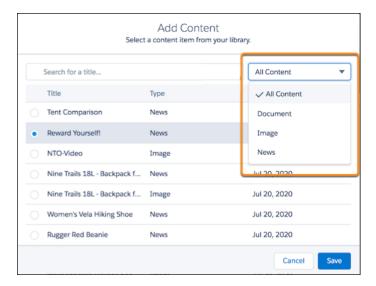
Filter by Content Type in Salesforce CMS

Quickly find content in the Salesforce CMS app, single items, or collections with a content type filter and search ability for a filtered list.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To create and edit content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

Why: Find your published content more easily by filtering by content type, and then paring down to the specific file you want to use. Streamline the search for collections of your CMS content and Salesforce CRM data as well.



Files: Retired Support for Adobe Flash Rendition

Switch your file rendition in Connect REST API from Adobe Flash to SVG.

Switch Your File Rendition in Connect REST API

With Winter '21, Connect REST API stops creating Adobe Flash renditions. Switch to SVG renditions.

Where: This change applies to Lightning Experience and Salesforce Classic in every edition, except Professional.

How: Use the Connect REST API File Preview resource to get an SVG rendition.

Mobile: Productivity Features and More Convenient Navigation

Get more done in the Salesforce mobile app with launchpad, activity timeline, and other productivity boosters. Notifications features give you even more control over your custom notifications. Mobile Publisher for Communities now supports Marketing Cloud push notifications (Pilot). Experience the future of CRM with Salesforce Anywhere's real-time alerts, chat, and suggested actions (Beta).

IN THIS SECTION:

Salesforce Mobile App: Navigation and Productivity Enhancements

Launchpad shortcuts, improved scrolling, and the iOS Quick Navigation widget make navigation a breeze. Report highlights and the activity timeline give iOS users the information they need at a glance.

Notifications: Tighter Security and More Flexible Navigation

A newly announced release update gives you more control over which of your users can trigger the Send Custom Notification action. Use the new Target Page Reference field to specify a new kind of navigation target for your custom notifications.

Mobile Publisher for Communities: Marketing Cloud Notifications (Pilot), Barcode Scanner Plugin (Beta), and More

Mobile Publisher for Communities now supports Marketing Cloud push notifications. Use the mobile device camera to scan barcodes. Create and customize the navigation menu for your communities users.

Salesforce Anywhere: Plan and Accelerate Your Business in Real Time (Beta)

Salesforce Anywhere is the future experience of CRM — making Salesforce real time. Get alerts about changes to the Salesforce data you care about. Update your Salesforce data in just a few taps with suggested actions. Collaborate in context with chat. Search and view your Salesforce data. And integrate Salesforce Anywhere chat and alerts into your business processes with Lightning Flow and Process Builder.

Salesforce Mobile App: Navigation and Productivity Enhancements

Launchpad shortcuts, improved scrolling, and the iOS Quick Navigation widget make navigation a breeze. Report highlights and the activity timeline give iOS users the information they need at a glance.

IN THIS SECTION:

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

App Store and Google Play Updates

Although major releases bring major changes to the Salesforce mobile app, we're always working to improve your mobile experience. We sometimes make smaller but still mighty changes that we can't wait to share with you, so we release them in App Store[®] and Google Play[™] updates. Learn about our latest release in Salesforce Help.

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of October 19, 2020.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Browser and Operating System			
Salesforce Mobile App Requirements Have Changed on page 419	✓	✓	
Einstein Analytics			
Streamline How Your Mobile Users Access Dashboards from a Record Page on page 424		✓	✓
Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android on page 426	~		✓
Navigation and Actions			
Create Shortcuts to Users' Essential Pages on page 420	~	✓	~

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Cruise Through the App with Improved Scrolling on page 421	✓	✓	
Productivity Features			
Keep Track of Your Activities with Activity Timeline on iOS on page 422		✓	
Get to the Point with Report Highlights on page 422	✓	✓	
See the Bigger Picture with a Monthly Calendar View on page 423	✓	✓	
Industries			
Stay Productive with Financial Services Cloud Lightning Components for Mobile on page 426	✓	✓	~
Access and Security			
Update Your Android Devices' Security Patch on page 427			

IN THIS SECTION:

Streamline How Your Mobile Users Access Dashboards from a Record Page

Embedded dashboards are great because they put relevant data where it matters most: directly in the record. But embedded dashboards aren't always optimized for mobile devices. They take up limited screen space, and they take time to load when connectivity is less than ideal. Now you can use custom links to fast-track how your mobile users access dashboards from records.

Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android

Salesforce for Android users now have a home base for their Einstein Analytics apps and dashboards with the new Analytics navigation item for Lightning apps. With the new item, users can browse their apps and access their favorites. With more functionality in the Salesforce app, Einstein Analytics users don't have to switch between apps to complete important business tasks.

SEE ALSO:

Get Forecasts on the Go

Salesforce Mobile App Requirements Have Changed

Salesforce is revising the requirements for using the Salesforce mobile app for iOS and Android. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the Salesforce experience.

Mobile Devices Used for Salesforce Testing

Salesforce performs automated and manual testing of the Salesforce mobile app for iOS and Android on a select set of mobile devices. This is the list of devices for Winter '21.

Platform	Phones	Tablets
Android	Google Pixel 4 XLGoogle Pixel 3	

Platform	Phones	Tablets
	• Samsung Galaxy S10 / S10+	
	 Samsung Galaxy S9 / S9+ 	
	 Samsung Galaxy S8 / S8+ 	
	 Samsung Galaxy S7 	
	 Samsung Galaxy Note 10+ 	
	 Samsung Galaxy Note 9 	
	Samsung Galaxy Note 8	
iOS	• iPhone 11 Pro / Pro Max	• iPad Pro 10.5"
	• iPhone 11	• iPad Air 2
	• iPhone XR	• iPad Mini 4
	• iPhone XS / XS Max	
	• iPhone X	
	• iPhone 8 / 8 Plus	
	• iPhone 7 / 7 Plus	
	• iPhone SE	
	• iPhone 6S	
	• iPhone 6	

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce might not be able to replicate some issues for customers using Salesforce on untested devices due to manufacturer-specific customizations.

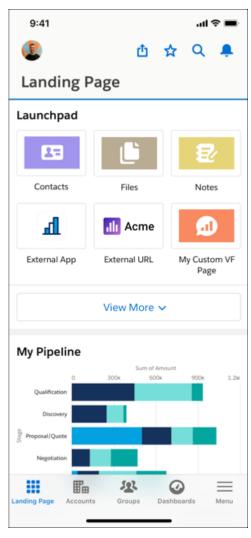
To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, the list of Salesforce-tested devices is subject to change at the sole discretion of Salesforce, with or without advance notice.

Create Shortcuts to Users' Essential Pages

Set up a mobile launchpad to let users quickly access the information they need. Use the Launchpad Lightning web component to add links to Lightning pages on mobile and desktop. Internal links open in the Salesforce mobile app, while external links open in a mobile browser window.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in all editions, except Database.com.

Why: We know that users pull up the app for a quick look at important information, but it can take a lot of taps to get to the right place. The mobile launchpad lets users access that information in fewer taps.



How: Add the Launchpad Lightning web component to a Lightning page. Add up to 20 items to the launchpad. Users see the first six items on the page, with the option to view more. After you click **Save**, view your launchpad by navigating to that page in the Salesforce mobile app or on desktop.

SEE ALSO:

Salesforce Help: Create a Custom Launchpad for the Salesforce Mobile App (can be outdated or unavailable during release preview)

Cruise Through the App with Improved Scrolling

We heard your feedback and upgraded the way that you navigate the Salesforce mobile app. With these updates, you enjoy a smoother experience when you scroll through pages and refresh the app. You can also copy and paste directly in the app.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

When: This change is available the week of October 19, 2020.

Why: Improved scrolling is even better for users who have assistive technologies enabled, especially screen readers. This improvement removes the screen scrolling buttons that were previously enabled when VoiceOver was running on iOS devices.

How: For information about turning on native scrolling, contact your Account Executive. After you sign up for the beta, enable the feature for your users in Setup. Select **Users** > **Permission Sets** > **New**. Under Choose License, select **None** and add the following

system permission: Salesforce Mobile App: Native scrolling on webviews. Under Manage Assignments, add the assignment to users who should have native scrolling. To start to use native scrolling, users must force guit and restart the app.

Keep Track of Your Activities with Activity Timeline on iOS

You spoke and we listened. The activity timeline is now available in the Salesforce mobile app for leads, opportunities, accounts, and contacts. On these record types, iOS users can view all of the tasks, events, and emails associated with a record in one convenient feed. Previously, admins had to create a related list with the activity history view to track activities in the mobile app.

Where: This change applies to version 226.030 or higher of the Salesforce mobile app for iOS in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: It's easy to see why end users are big fans of the activity timeline. Activity timeline helps them to pick up where they left off and focus on their next steps. It appears at the bottom of record pages, above the navigation bar, so it's easier to get to than an activity history related list. It's also simpler to follow because all activities are listed in chronological order.



Note: Filter and search aren't supported for the mobile activity timeline.

How: The mobile activity timeline is enabled by default on supported record types, but you can choose to disable it for all users by adding a connected app custom attribute. In Setup, in the Quick Find box, enter Connected Apps, select Manage Connected Apps, then click the name of the connected app you want to modify. In the Custom Attributes section on the connected app page, click New. Enter DISABLE ACTIVITY TIMELINE for the attribute key and "true" for the attribute value.

SEE ALSO:

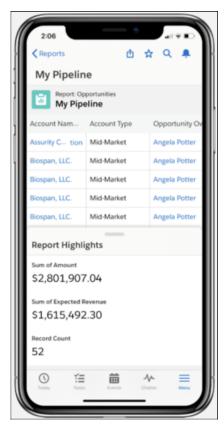
Salesforce Help: Activity Timeline Customization Considerations (can be outdated or unavailable during release preview)

Get to the Point with Report Highlights

Users can get a high-level overview of their reports on the Salesforce mobile app. Report Highlights shows summaries of up to eight key metrics, including average amounts, grand totals, subtotals, record counts, and formula column results. For summary and matrix reports, users can also see totals for groups based on the first-level group field.

Where: This change applies to Version 226 and higher of the Salesforce mobile app for iOS and Android in all editions, except Database.com.

Why: When users view reports on a mobile device, they want information at a glance, instead of scrolling (and scrolling) through a long, detailed report table. Summed totals help them get in and out of their data, and on with their day.



Users can customize the metrics that appear in Report Highlights from the report run page on Lightning Experience desktop.

SEE ALSO:

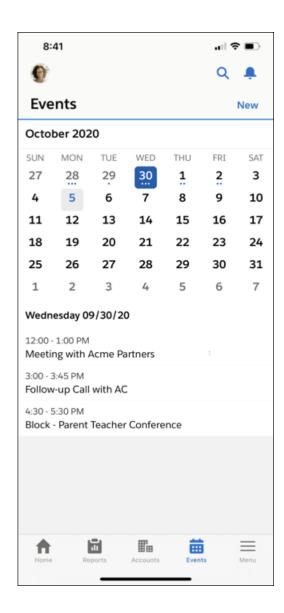
Salesforce Help: Customize Report Views in the Run Page

See the Bigger Picture with a Monthly Calendar View

The new monthly view of your calendar in the Salesforce mobile app makes it easier to see what's upcoming. Plus, you can now see up to 12 months in advance, instead of the previous 12 weeks.

Where: This change applies to the new Salesforce mobile app for iOS and Android in all editions, except Database.com.

Why: Planning ahead makes good business sense, but you can only get so far tapping from one week to the next. The monthly view makes it easier to see when your schedule is already action packed and when you have room for more. Tap on a day in the monthly view to drill down and edit and create events.

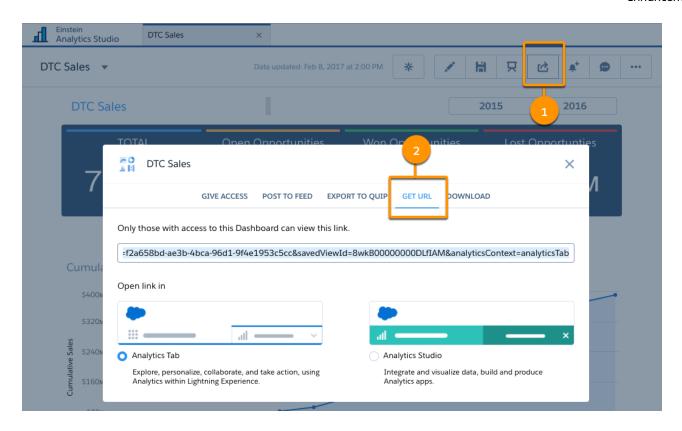


Streamline How Your Mobile Users Access Dashboards from a Record Page

Embedded dashboards are great because they put relevant data where it matters most: directly in the record. But embedded dashboards aren't always optimized for mobile devices. They take up limited screen space, and they take time to load when connectivity is less than ideal. Now you can use custom links to fast-track how your mobile users access dashboards from records.

Where: This change applies to Lightning Experience and version 226.030 or higher of the Salesforce mobile app for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

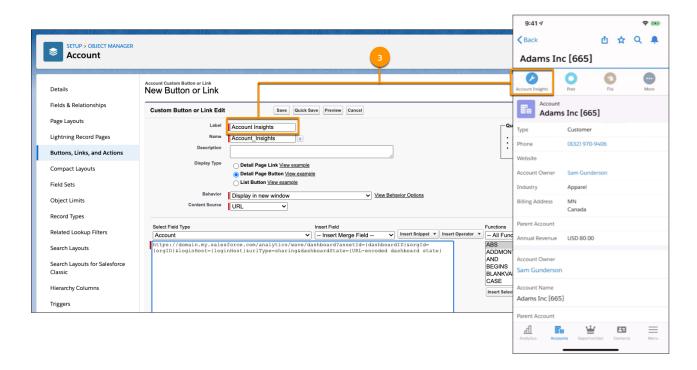
How: To create a custom URL to a dashboard, use the Share (1) and GET URL (2) option in Einstein Analytics.



To optionally open a dashboard in a specific state, add the dashboardState parameter to the URL. Use this syntax for the custom link URL.

 $https://domain.my.salesforce.com/analytics/wave/dashboard?assetid={clashboardIID} \& orgid={orgID} \& loginHost| \& url Type=sharing \& dashboardState={URL-encoded dashboard state} \\$

In Setup, add the custom link URL to a record page in the Object Manager. For example, create an *Account Insights* (3) link so account owners can launch a sales metrics dashboard with relevant filters applied directly from a record.



SEE ALSO:

Salesforce Help: Launch Einstein Analytics Assets with URLs (can be outdated or unavailable during release preview)
Salesforce Help: Share Dashboards, Widgets, and Lenses (can be outdated or unavailable during release preview)

Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android

Salesforce for Android users now have a home base for their Einstein Analytics apps and dashboards with the new Analytics navigation item for Lightning apps. With the new item, users can browse their apps and access their favorites. With more functionality in the Salesforce app, Einstein Analytics users don't have to switch between apps to complete important business tasks.

Where: This change applies to Lightning Experience and version 226.030 or higher of the Salesforce mobile app for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Admins can add the Analytics navigation item to Lightning apps in the Lightning App Builder. Analytics does not show up in the Mobile Only navigation item list in the App Launcher.



Note: Lenses and datasets that aren't supported in the Salesforce mobile app open in the Einstein Analytics for Android app.

Stay Productive with Financial Services Cloud Lightning Components for Mobile

Boost remote user productivity by including Financial Services Cloud Lightning Components in the Salesforce mobile app.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Give Salesforce Mobile users access to the Financial Services Cloud features that they need to stay productive away from their desks.

SEE ALSO:

Stay Productive with Financial Services Cloud Lightning Components for Mobile

Update Your Android Devices' Security Patch

To ensure that their device is secure, Android OS 8 and 9 users should make sure that their security patch is from October 2018 or later. For more information, see Android Security Bulletin–October 2018.

Where: This change applies to the Salesforce mobile app for Android in all editions.

App Store and Google Play Updates

Although major releases bring major changes to the Salesforce mobile app, we're always working to improve your mobile experience. We sometimes make smaller but still mighty changes that we can't wait to share with you, so we release them in App Store® and Google Play™ updates. Learn about our latest release in Salesforce Help.

228.010

This version of the Salesforce mobile app is available the week of November 16, 2020.

228.020

This version of the Salesforce mobile app is available the week of January 4, 2021.

Notifications: Tighter Security and More Flexible Navigation

A newly announced release update gives you more control over which of your users can trigger the Send Custom Notification action. Use the new Target Page Reference field to specify a new kind of navigation target for your custom notifications.

IN THIS SECTION:

Require User Permission for the Send Custom Notification Action (Update)

This update gives you more control over which of your users can trigger the Send Custom Notification action. When this update is activated, a user must have the Send Custom Notifications user permission to trigger the Send Custom Notification action in flows that run in user context, REST API calls, or Apex callouts. Use the Send Custom Notifications user permission to improve the security of your Salesforce org and limit custom notifications to desired users and use cases.

Send Your Custom Notification Recipients to New Places with Page Reference Navigation

Use the new Target Page Reference field on the Send Custom Notification action to specify navigation targets for your custom notifications sent via flow or REST API. Previously, only the Target ID field was available for custom notification navigation and only a record ID could be specified as a navigation target. Now your custom push and in-app notifications can navigate to any page that's accessible via the PageReference class, such as a Lightning app or an external URL.

Require User Permission for the Send Custom Notification Action (Update)

This update gives you more control over which of your users can trigger the Send Custom Notification action. When this update is activated, a user must have the Send Custom Notifications user permission to trigger the Send Custom Notification action in flows that run in user context, REST API calls, or Apex callouts. Use the Send Custom Notifications user permission to improve the security of your Salesforce org and limit custom notifications to desired users and use cases.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update for existing orgs in Spring '21. Salesforce enforces this update for orgs created in Winter '21 or later beginning in Winter '21. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: When this update is activated, a user must have the Send Custom Notifications user permission to trigger the Send Custom Notification action in flows that run in user context, REST API calls, or Apex callouts. Because most flows, REST API calls, and Apex callouts that trigger the REST API run in user context by default, they enforce the running user's permissions. If a user without the permission launches a flow that runs in user context, a REST API call, or an Apex callout that contains the Send Custom Notification action, the flow, REST API call, or API callout results in an error and no custom notifications are sent.

To ensure that custom notifications continue to be triggered and sent as expected, review your existing flows, REST API calls, and Apex callouts that send custom notifications. If necessary, modify them according to the recommendations in the Require User Permission for the Send Custom Notification Action release update in the Release Updates node in Setup.

You don't need to review or modify your processes or flows that run in system context that send custom notifications. Because processes and some flows run in system context by default, they don't enforce the running user's permissions. The Send Custom Notification action is triggered, and notifications are sent as expected.

But you can choose to restrict the users who can trigger custom notifications in processes and flows that run in system context. Recreate your process or flow as a flow that runs in user context. Then assign the Send Custom Notifications user permission to users you want to be able to launch your flow.

SEE ALSO:

Release Updates

Salesforce Help: Which Context Do Flows Run In?

Salesforce Help: Send Custom Notifications (can be outdated or unavailable during release preview)

Send Your Custom Notification Recipients to New Places with Page Reference Navigation

Use the new Target Page Reference field on the Send Custom Notification action to specify navigation targets for your custom notifications sent via flow or REST API. Previously, only the Target ID field was available for custom notification navigation and only a record ID could be specified as a navigation target. Now your custom push and in-app notifications can navigate to any page that's accessible via the PageReference class, such as a Lightning app or an external URL.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions. Custom notifications can be received in Lightning Experience and all versions of the Salesforce mobile app in all editions, except Database.com.

How: When you add or modify the Send Custom Notification action in a flow or REST API call, you must specify either a record ID in the Target ID field or a PageReference for the Target Page Reference field on the action.

SEE ALSO:

Lightning Aura Components Developer Guide: pageReference Types

Salesforce Help: Flow Core Action: Send Custom Notification (can be outdated or unavailable during release preview)

Actions Developer Guide: Send Custom Notification Actions (can be outdated or unavailable during release preview)

Salesforce Help: Send Custom Notifications (can be outdated or unavailable during release preview)

Mobile Publisher for Communities: Marketing Cloud Notifications (Pilot), Barcode Scanner Plugin (Beta), and More

Mobile Publisher for Communities now supports Marketing Cloud push notifications. Use the mobile device camera to scan barcodes. Create and customize the navigation menu for your communities users.

IN THIS SECTION:

Configure Marketing Cloud Notifications (Pilot)

Marketing Cloud push notifications have come to the Mobile Publisher for Communities app. You can create and send notifications to increase engagement with your community app users.

Use Your Mobile Device Camera to Scan Barcodes (Beta)

Mobile Publisher for Communities users can use the camera on their mobile device to scan barcodes, such as a UPC symbol or QR codes.

Customize How Users Navigate in the Community App (Pilot)

Put Mobile Publisher for Communities users' frequently used menu items within easy reach. You can customize the type and order of menu items with the community Experience Builder.

Configure Marketing Cloud Notifications (Pilot)

Marketing Cloud push notifications have come to the Mobile Publisher for Communities app. You can create and send notifications to increase engagement with your community app users.

Where: This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



Note: We provide Marketing Cloud Notifications to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Marketing Cloud Notifications isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

When: This pilot feature is available in the Winter '21 release.

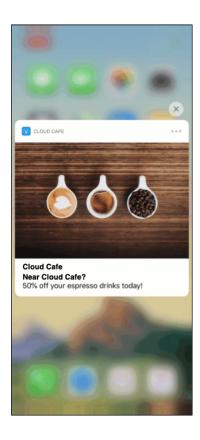
Who: Available to orgs that enable the pilot feature and admins who have Lightning Community access.

Why: Marketing Cloud notifications lets you target notifications to a specific audience and analyze usage statistics.

How: Marketing Cloud MobilePush integration with Mobile Publisher for Communities lets you send both marketing cloud and platform notifications to the same communities app.

Supported Marketing Cloud notification features:

- Rich media push notifications such as images, audio, and video.
- Location-based push notifications.
- OpenDirect push notifications with internal and external links.
- Authenticated and unauthenticated push notifications (user doesn't have to be logged in).
- In-app notifications in varying sizes.



To enable Marketing Cloud notifications for your community apps, enter your Marketing Cloud information and community details into Mobile Publisher. Mobile Publisher builds and publishes your community app capable of receiving Marketing Cloud notifications.

SEE ALSO:

Salesforce Help: MobilePush

Salesforce Help: MobilePush OpenDirect

Use Your Mobile Device Camera to Scan Barcodes (Beta)

Mobile Publisher for Communities users can use the camera on their mobile device to scan barcodes, such as a UPC symbol or QR codes.

Where: This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



Note: As a beta feature, the barcode scanner is a preview and isn't part of the subscription agreement with Salesforce. This beta feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available features.

When: Barcode scanner is available in the Winter '21 release.

Who: Available for users who can access a Lightning Community and meet mobile device requirements.

Why: We want your users to accomplish more while using their communities app on their mobile devices.

How: Barcode scanner requires the use of the mobile device camera. The user must grant your communities app access to the camera.



To develop and implement a Lightning component with the barcode scanning feature, use the BarcodeScanner API.

SEE ALSO:

Lightning Web Components Dev Guide: Scan Barcodes on a Mobile Device Salesforce Help: Requirements for Mobile Publisher for Communities

Customize How Users Navigate in the Community App (Pilot)

Put Mobile Publisher for Communities users' frequently used menu items within easy reach. You can customize the type and order of menu items with the community Experience Builder.

Where: This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



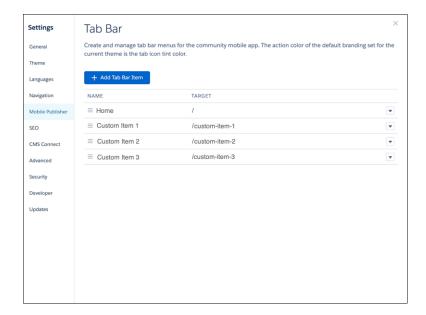
Note: We provide Custom Navigation Tab Bar to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Custom Navigation Tab Bar isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features.

When: This pilot feature is available in the Winter '21 release.

Who: Available to orgs that enable the pilot feature and admins who have Lightning Community access.

Why: We want to make sure that you can tailor the navigation experience for your community app users.

How: Use the community Experience Builder to customize the navigation tab bar for your users.





SEE ALSO:

Salesforce Help: Experience Builder Overview

Salesforce Anywhere: Plan and Accelerate Your Business in Real Time (Beta)

Salesforce Anywhere is the future experience of CRM — making Salesforce real time. Get alerts about changes to the Salesforce data you care about. Update your Salesforce data in just a few taps with suggested actions. Collaborate in context with chat. Search and view your Salesforce data. And integrate Salesforce Anywhere chat and alerts into your business processes with Lightning Flow and Process Builder.



Note: Salesforce Anywhere is a Non-GA Service and not a "Service" or part of the "Services", as defined in the Master Subscription Agreement ("MSA") with Salesforce. Such Non-GA Service is subject to the terms and conditions of the Universal Pilot Research Agreement ("UPRA"), including the Data Processing Addendum to the UPRA. Use of this Non-GA Service is at your sole discretion, and any purchase decisions should be made only on the basis of Salesforce generally available products and features. Automatic availability of Salesforce Anywhere depends on your MSA with Salesforce and the type of Services you have purchased. If you do not see Salesforce Anywhere in Setup, contact your Account Executive to get access to Salesforce Anywhere.

Learn about the latest features in the Salesforce Anywhere Release Notes.

SEE ALSO:

Salesforce Anywhere Overview

Customization: Lightning Flow Enhancements, More Dynamic Lightning Pages, and Einstein Builder Updates

Build and test flows with new layout and debug options, and launch flows when records are deleted. Break up your record details and create more flexible Lightning pages with Dynamic Forms and Dynamic Actions in the Lightning App Builder. Recommend anything to anyone with Einstein Recommendation Builder (beta).

IN THIS SECTION:

Lightning Flow: Trigger on Delete, Enhanced Debugging, Multi-Column Screens (Pilot), Auto-Layout Canvas (Beta), and More Control of Flow Launch, Decisions, Queries, and Filters

Trigger flows to run when records are deleted. Debug flows as another user, and debug autolaunched flows right in the canvas (beta). Optimize the layout of your flow screens with sections and columns (pilot). Let Flow Builder connect and align elements for you (beta). Launch a record-triggered flow or execute a decision outcome only when the record is updated to meet your criteria. Apply custom logic to record queries and condition requirements throughout your flows.

Lightning App Builder: Dynamic Forms Is Generally Available, Dynamic Actions Enhancements, and Record Page Performance Analysis Break up your record details and create more dynamic Lightning pages with Dynamic Forms, now generally available. Discover more ways to add the flexibility and control of dynamic actions to your record pages. Get an analysis of a Lightning record page's runtime performance while you're designing it with Performance Analysis in App Builder.

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric Predictions

Einstein Recommendation Builder delivers personalized, Al-driven recommendations of anything to anyone. Einstein Prediction Builder supports record-level insights for numeric predictions.

Globalization: Translation Import and Export Improvements, New Locale Formats, and a New Platform Language

If a translation import has errors, the email you receive provides more detail and includes the error log as an attachment. Data translation import and export limits are increased, and you can export data translation files for specific languages. Enable new and improved formats for international dates and times via an update. Plus, we added Khmer as a platform-only language.

Profiles and Permissions: More Granular Control for Security and a New License Option

Improve your Salesforce org security with new options to restrict permission cloning and to limit the profiles that users can see. Subscribed to a Salesforce managed package? See which customer permissions in the package require a Salesforce license to access them.

Salesforce Connect: Restricted Access, HIPAA Compliance, and ID Mapping Limits

We're restricting edit access to certain sensitive fields on external data sources and named credentials. Salesforce Connect is now Health Insurance Portability and Accountability Act (HIPAA) compliant, ensuring that all personally identifiable healthcare information is protected from fraud and theft. We're also keeping ID mappings up to date by enforcing a process that deletes all external object record IDs that haven't been viewed within 365 days.

Einstein Next Best Action: HIPAA Compliance, Event-Driven Recommendations Based on Call State Changes, and Al-Driven Recommendations Generated by Einstein Recommendation Builder

Store and process protected health information. Create recommendations based on call record field values. Use the new Einstein Load element to deliver personalized recommendations.

External Services: Check External Services Version and Recreate Legacy Registrations to Get Ready for Retirement of Legacy External Services in Summer '21

Check your External Services version for Legacy External Services, and recreate legacy registrations to current External Services registrations. Legacy External Services is scheduled for retirement in Summer '21.

Sharing: Metadata API Deployment Improvements and Secure Guest User Sharing Settings

You can now deploy organization-wide defaults and criteria-based or guest user sharing rule changes through the Metadata API at the same time. To safeguard your Salesforce org's data, we enabled the Secure guest user record access setting in all orgs with communities or sites. This setting can't be disabled.

Fields: HTML in Labels Rendered as Plain Text and Management for Deleted Fields Available in Lightning Experience

HTML tags in custom field labels are rendered as plain text, and you can now manage deleted fields in Lightning Experience.

Custom Metadata Types: Support for Geolocation Entities and Metadata Relationship Field Type User Interface Display

You can now create entity particle relationships for geolocation field types. Also, the dropdown menu for the metadata relationship field type shows which entities are supported.

General Setup: Utility Bar Alignment Customization, Dynamic Submit for Approval Action, and Record Type UI Changes

Customize where your org's utility bar appears on the screen. Display the Submit for Approval action only when a record is eligible for approval. Clearer description text and an updated profile column label for Step 1 of the New Record Type creation process.

Lightning Flow: Trigger on Delete, Enhanced Debugging, Multi-Column Screens (Pilot), Auto-Layout Canvas (Beta), and More Control of Flow Launch, Decisions, Queries, and Filters

Trigger flows to run when records are deleted. Debug flows as another user, and debug autolaunched flows right in the canvas (beta). Optimize the layout of your flow screens with sections and columns (pilot). Let Flow Builder connect and align elements for you (beta). Launch a record-triggered flow or execute a decision outcome only when the record is updated to meet your criteria. Apply custom logic to record queries and condition requirements throughout your flows.

EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

IN THIS SECTION:

Flow Builder: Record-Triggered Flows That Run on Delete, Shiny Debug Options, Multi-Column Flow Screens (Pilot), Auto-Layout Canvas (Beta), and More Criteria Control

Build a flow to perform actions right before a record is deleted from the database. Test flows as the users who run them, and debug autolaunched flows right in the canvas (beta). Optimize your flow screens with sections and columns (pilot). Eliminate crooked, misaligned connectors with auto-layout (beta). Run flows or execute decision outcomes only when records are updated to meet your criteria. Fine-tune the condition requirements throughout your flows.

Lightning Flow Management: Run-Time Improvements Delivered by API Version and Triggers in the Flows List View

Control when each flow adopts run-time behavior changes. Quickly see which triggers your autolaunched flows have on the Flows page in Setup.

Lightning Flow Extensions: Multi-Object Screen Components, Custom UIs for Screen Components and Invocable Actions, and Simplified Import of Actions via External Services (Pilot)

Have developers build screen components that work for any object you choose. Enjoy engaging UIs that developers build for the screen components and invocable actions that you add to your flows. Use external services to quickly import public API specifications, and add their actions to your flows (pilot).

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions

Resume paused interviews in the same context and with the same user access they had before they were paused. Let processes evaluate the original values of record fields. Improve the behaviors and effects of failed invocable actions. Enforce the running user's data access when executing flow merge fields. Respect the public access modifiers for legacy Apex actions. Cancel the "Require User Access to Apex Classes Invoked by Flow" update.

Flow and Process Run-Time Improvements in API Version 50.0

These updates affect only flows and processes that are configured to run on API version 50.0 or later. Versioned updates let you test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

Flow Builder: Record-Triggered Flows That Run on Delete, Shiny Debug Options, Multi-Column Flow Screens (Pilot), Auto-Layout Canvas (Beta), and More Criteria Control

Build a flow to perform actions right before a record is deleted from the database. Test flows as the users who run them, and debug autolaunched flows right in the canvas (beta). Optimize your flow screens with sections and columns (pilot). Eliminate crooked, misaligned connectors with auto-layout (beta). Run flows or execute decision outcomes only when records are updated to meet your criteria. Fine-tune the condition requirements throughout your flows.

IN THIS SECTION:

Trigger a Flow to Run Before a Record Is Deleted

In Flow Builder, you can now configure a new record-triggered flow to run before a record is deleted. You no longer need to write Apex code to set this up. This autolaunched flow runs in the background and updates related records when a record is deleted.

Debug Flow Errors in Sandbox Org as Another User

Debugging a flow in a sandbox org is easier now because you can debug that flow as another user. Test a flow by "impersonating" a user, without logging in as that user. Troubleshoot a flow by seeing the flow's debug log exactly as a specified user sees it. Catch flow exceptions such as unexpected permission, sharing, and profile configurations—before they occur in production orgs.

Debug Autolaunched Flows Directly on the Canvas (Beta)

Now you can see the path your flow takes when debugging an autolaunched, non-triggered flow. In Debug on Canvas (beta) in Flow Builder, you can view the debug run's path and debug log side by side. You can also see how close your flow's elements came to hitting SOQL guery limits.

Build Multi-Column Screens in Flow Builder (Pilot)

You can divide each flow screen into multiple sections and columns to create a visually appealing and effective layout—without touching a single line of code. In Flow Builder, use the new Section component to easily arrange screen components into multiple columns. The multi-column screen layout is responsive, so columns stack vertically to fit on mobile phones.

Place Flow Elements Automatically with Auto-Layout (Beta)

Building flows and aligning elements is easier now with auto-layout. Elements on the canvas are spaced and connected automatically. And no more elements positioned slightly out of alignment!

Improve Performance With Record-Triggered Flows That Run Only for Specific Changes

We added entry criteria to record-triggered flows that update records, giving you more control over your automation. You can configure the flow to run every time a record that meets specified criteria is updated, or only when a record is changed to meet the criteria. Depending on the flow, this optimization can significantly reduce the impact that record-triggered flows have on your Salesforce org's performance.

Take a Flow Path Only When Certain Record Changes are Made

Now you can filter out record updates that are unrelated to your flow's use case and avoid reprocessing records that previously triggered the flow. A flow that's triggered by a record update can take different paths if the record that triggered the flow was edited to meet certain criteria. When you configure a Decision outcome, you can now set that outcome to execute only when the triggering record is updated to meet the condition requirements.

Use AND, OR, and Custom Operators Across All Flow Builder Elements

We've taken the condition-defining options you're familiar with in the Decision and Pause elements and extended them consistently across Flow Builder. Specify that you want the condition logic to meet ANY conditions or that you want it to meet ALL conditions. For example, specify contacts with the name Joe OR the city of San Francisco. Or you can provide your own custom logic. We've added these options to the Get Records, Update Records, and Delete Records elements, and to screen elements. You can also find the options in the Start element when configuring schedule- and record-triggered flows, and in record choice sets.

Locate a Flow Builder Error with the Click of a Link

If you get an error in Flow Builder, go straight to it instead of hunting through your flow. Flow Builder error messages now include a link, when available, that opens the erroneous element and highlights it on the canvas. The auto-layout canvas and resources don't support highlighting.

Easily Access Related Record Data in Autolaunched Flows with Triggers

Now in autolaunched flows with triggers, you no longer need to create Get Records elements to find associated records and retrieve data from them. Instead, when you configure flow elements and resources, you can easily drill down to the field values of a global or record variable's associated records. For example, in a Decision element, drill down from \$Record to Account ID to Customer Priority.

Use Your Salesforce Org's Global Variables Everywhere in Flows

Access information about your org or the running user throughout your flows by referencing global variables. Previously, most global variables were available only in flow formulas, and Flow Builder displayed only the first 100 options for each type of global variable. Now you get all global variable options from anywhere in Flow Builder that supports variables. For example, you can easily display the running user's name to personalize your flow screens.

View Merge Field Labels in Flow Builder

Now get easy—to—read labels in the form of a pill for merge fields such as global constants and global variables. We're hiding the complexity of the merge field syntax but the syntax is still there if you need it. After you select a merge field and move to another field, the merge field's label appears. The label doesn't change the merge field value. With pills, you can click **X** to remove a merge field. The labels are available only in some areas such as logic elements, data elements, and screen component visibility.

Text Template Setting Is Saved

After you save a flow resource as either View as Rich Text or View as Plain Text, the Text Template flow resource remembers your text view setting.

Flow Screen Previews of Picklist and Multi-Select Picklist Components Are No Longer Interactive

When you add a component to a screen in Flow Builder, the component appears in the screen canvas. However, the components aren't interactive within the screen canvas. Previously, the picklist and multi-select picklist components were interactive, but not always in ways that were expected or helpful.

Trigger a Flow to Run Before a Record Is Deleted

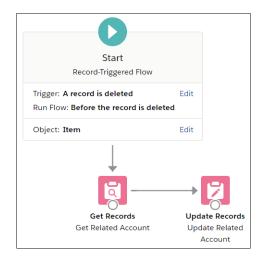
In Flow Builder, you can now configure a new record-triggered flow to run before a record is deleted. You no longer need to write Apex code to set this up. This autolaunched flow runs in the background and updates related records when a record is deleted.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

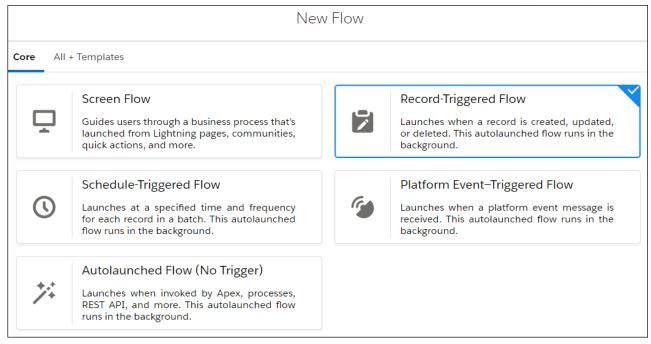
Who: To activate a record-triggered flow that runs before the record is deleted, you need the Manage Flows and View All Data permissions.

Why: For example, suppose that your Salesforce org has a custom field on the Account object that tracks the total items related to that account. Without automation, this field is updated manually every time a related item is deleted. Now, you can automate this task with a record-triggered flow that runs before a record is deleted.

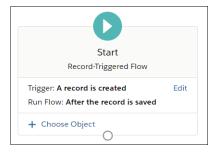
The flow runs anytime an item is deleted. It finds the related account, and decrements the total number of items. When the flow finishes, the item that launched the flow is deleted.



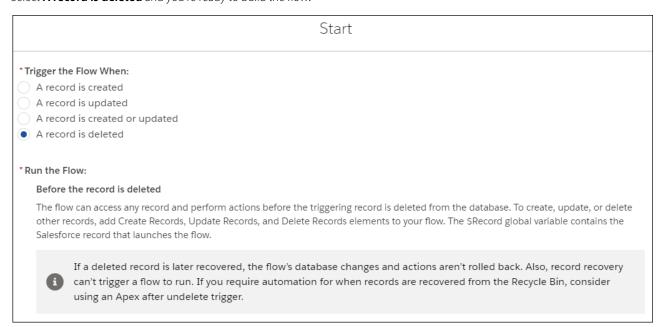
How: When creating a flow, select **Record-Triggered Flow**.



To configure the flow to run before a record is deleted, click **Edit** on the Start element.



Select A record is deleted and you're ready to build the flow.



The flow can access any record and perform actions before the record that launched the flow is deleted from the database. The \$Record global variable contains the Salesforce record that launches the flow.

Considerations for record-triggered flows:

- Launching a flow after restoring a record via the undelete operation is not supported.
- Displaying custom error messages via the addError() method is not supported in invocable actions.

SEE ALSO:

IdeaExchange: Workflow, Flow, Process Builder Triggered on Delete (partially delivered)

Debug Flow Errors in Sandbox Org as Another User

Debugging a flow in a sandbox org is easier now because you can debug that flow as another user. Test a flow by "impersonating" a user, without logging in as that user. Troubleshoot a flow by seeing the flow's debug log exactly as a specified user sees it. Catch flow exceptions such as unexpected permission, sharing, and profile configurations—before they occur in production orgs.

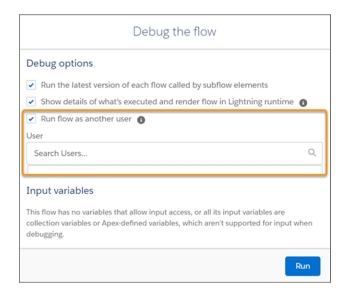
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: To enable this feature, you must have the Modify All Data, Manage Users, and Customize Application permissions. To use this feature after it's enabled, you need the Manage Flows and View All Data permissions.

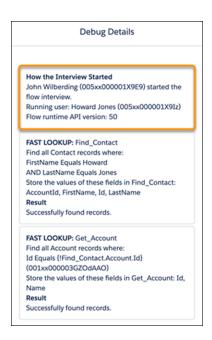
How: In Setup, go to Process Automation Settings and select the Let admins debug flows as other users checkbox.



Next open a flow in Flow Builder and click **Debug**. Select the **Run flow as another user** checkbox, and choose a user to impersonate.



The flow debug run then starts with you as the impersonated user. Review the debug details.



Debugging a flow as another user is available only for screen flows and autolaunched flows in nonproduction orgs. This feature supports flow elements and actions only. Any operations performed by screen components are performed as the logged-in user and not as the impersonated user. These screen components include custom Aura components, custom Lightning web components, and some standard flow screen components such as Lookup components.

SEE ALSO:

IdeaExchange: Debug Screen Flows running as a specific user

Debug Autolaunched Flows Directly on the Canvas (Beta)

Now you can see the path your flow takes when debugging an autolaunched, non-triggered flow. In Debug on Canvas (beta) in Flow Builder, you can view the debug run's path and debug log side by side. You can also see how close your flow's elements came to hitting SOQL query limits.

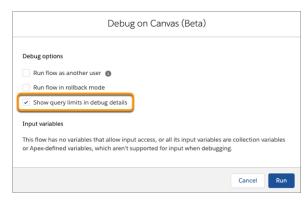
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

As a beta feature, Debug on Canvas is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Debug on Canvas in the Trailblazer Community.

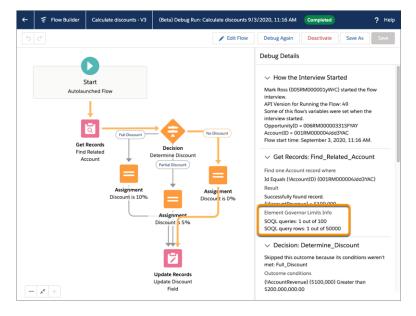
How: To debug autolaunched, non-triggered flows directly on the canvas, click Debug on Canvas (Beta).



Optionally, enable **Show query limits in debug details** to show each data element's SOQL query activity and its limits in the debug log. Data elements include Create Records, Update Records, Get Records, and Delete Records.



To see the debug run's path on the canvas, click **Run**. The debug log shows the information that you enabled.



Build Multi-Column Screens in Flow Builder (Pilot)

You can divide each flow screen into multiple sections and columns to create a visually appealing and effective layout—without touching a single line of code. In Flow Builder, use the new Section component to easily arrange screen components into multiple columns. The multi-column screen layout is responsive, so columns stack vertically to fit on mobile phones.

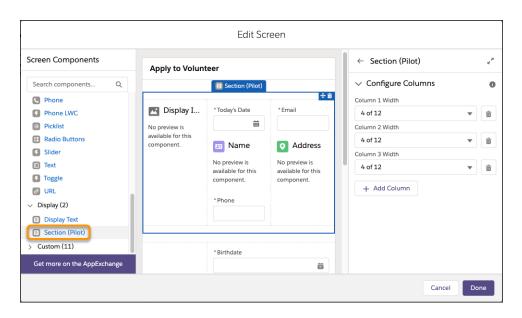
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Multi-column screens are supported only in Lightning flow runtime.



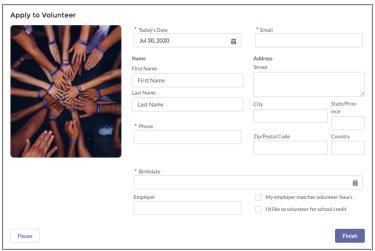
Note: We provide Flow Multi-Column Screens to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Flow Multi-Column Screens aren't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can find documentation and provide feedback and suggestions for Flow Multi-Column Screens in the Flow Multi-Column Screens Pilot group in the Trailblazer Community.

How: As you edit a screen in Flow Builder, drag the Section component onto the screen canvas. In the Section component's attributes, add columns and set their widths. Then drag other screen components into the columns on the screen canvas.

In this screen example, a section contains three columns of equal widths.



At run time, the screen from the previous example looks as follows.



Here's how the same screen appears on a mobile phone.



SEE ALSO:

Trailblazer Community: Flow Multi-Column Screens Pilot group

Place Flow Elements Automatically with Auto-Layout (Beta)

Building flows and aligning elements is easier now with auto-layout. Elements on the canvas are spaced and connected automatically. And no more elements positioned slightly out of alignment!

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

As a beta feature, auto-layout is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at

any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for auto-layout in the Trailblazer Community.

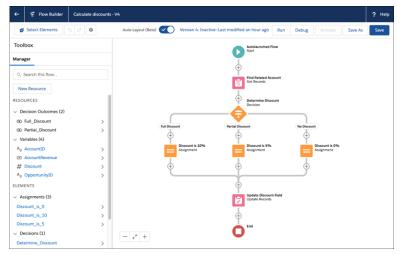
How: When you create a flow, choose auto-layout.



To switch between auto-layout and free-form for any flow, click Auto-Layout (Beta).



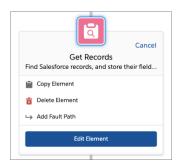
Behold the new auto-layout!



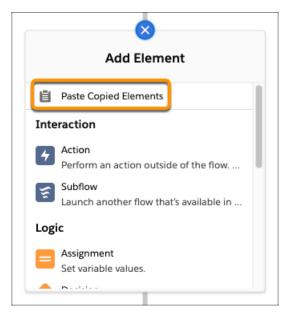
To insert an element, click \bigoplus where you want it to run. Flow Builder then shows the options and possible elements for this location.



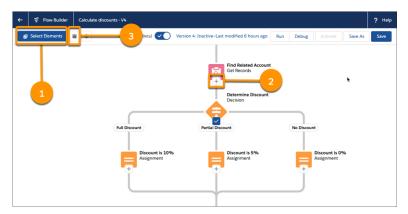
To edit an element, double-click it. To copy or delete an element or to add a fault path, click once.



After copying an element, click \bigoplus where you want to paste it. Then click **Paste Copied Elements**.



You can also copy and paste a set of elements to another location.



Click **Select Elements** (1), then click + on each desired element (2). To copy the elements, click + (3). To paste, click the desired location and then select **Paste Copied Elements**.

SEE ALSO:

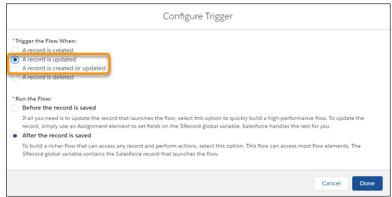
IdeaExchange: Flow builder: align canvas elements (Snap-to-Grid) (partially delivered)

Improve Performance With Record-Triggered Flows That Run Only for Specific Changes

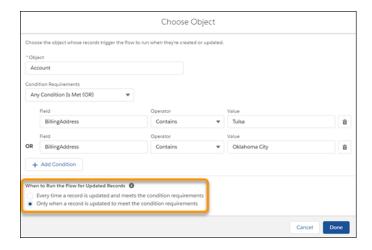
We added entry criteria to record-triggered flows that update records, giving you more control over your automation. You can configure the flow to run every time a record that meets specified criteria is updated, or only when a record is changed to meet the criteria. Depending on the flow, this optimization can significantly reduce the impact that record-triggered flows have on your Salesforce org's performance.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Create a record-triggered flow. Click Edit in the Start element. Select A record is updated or A record is created or updated.



Choose the object whose records trigger the flow to run. Define the condition requirements for the triggering record. Choose when to launch flows for updated records: every time a record that meets the requirements is updated, or only when a record is updated to meet the requirements. The latter option allows you to launch flows only when the triggering record changes from *not* meeting the specified requirements to meeting them.



SEE ALSO:

Use AND, OR, and Custom Operators Across All Flow Builder Elements
Take a Flow Path Only When Certain Record Changes are Made

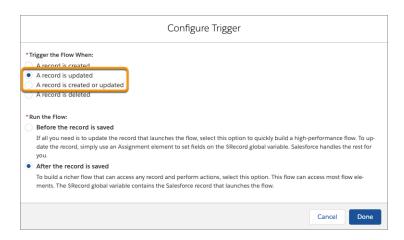
Take a Flow Path Only When Certain Record Changes are Made

Now you can filter out record updates that are unrelated to your flow's use case and avoid reprocessing records that previously triggered the flow. A flow that's triggered by a record update can take different paths if the record that triggered the flow was edited to meet certain criteria. When you configure a Decision outcome, you can now set that outcome to execute only when the triggering record is updated to meet the condition requirements.

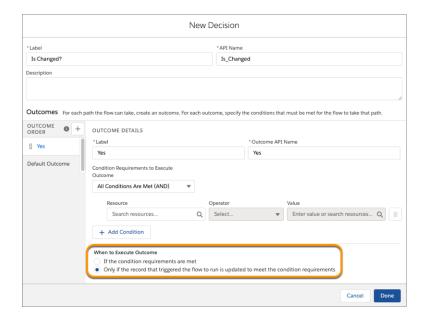
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: This option gives your flows a powerful filtering feature similar to the ISCHANGED function found in Workflow Rules and Process Builder and the oldMap/newMap variables found in Apex. Build more of your automation directly in Flow Builder without requiring Process Builder or Apex to check the prior version of the data.

How: On a record-triggered flow, configure the Start element to trigger when the record is updated, or when it's created or updated.



To configure a Decision element's outcome to only run when the triggering record is updated to match certain conditions, select **Only** if the record that triggered the flow to run is updated to meet the condition requirements.



Note: This option checks if the triggering record didn't previously meet the criteria and if the \$Record variable, not the triggering record, now meets the criteria. If your flow changes any of the \$Record variable's fields before it runs the configured Decision element, the Decision checks if the \$Record's new field values now meet the criteria.

Use AND, OR, and Custom Operators Across All Flow Builder Elements

We've taken the condition-defining options you're familiar with in the Decision and Pause elements and extended them consistently across Flow Builder. Specify that you want the condition logic to meet ANY conditions or that you want it to meet ALL conditions. For example, specify contacts with the name Joe OR the city of San Francisco. Or you can provide your own custom logic. We've added these options to the Get Records, Update Records, and Delete Records elements, and to screen elements. You can also find the options in the Start element when configuring schedule- and record-triggered flows, and in record choice sets.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

IdeaExchange: Allow OR and Condition Logic in Get/Update/Delete Records in Flow *IdeaExchange*: Process Builder & Flows use commas as "Or" logic in filters (partially delivered)

Locate a Flow Builder Error with the Click of a Link

If you get an error in Flow Builder, go straight to it instead of hunting through your flow. Flow Builder error messages now include a link, when available, that opens the erroneous element and highlights it on the canvas. The auto-layout canvas and resources don't support highlighting.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Easily Access Related Record Data in Autolaunched Flows with Triggers

Now in autolaunched flows with triggers, you no longer need to create Get Records elements to find associated records and retrieve data from them. Instead, when you configure flow elements and resources, you can easily drill down to the field values of a global or record variable's associated records. For example, in a Decision element, drill down from \$Record to Account ID to Customer Priority.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Use Your Salesforce Org's Global Variables Everywhere in Flows

Access information about your org or the running user throughout your flows by referencing global variables. Previously, most global variables were available only in flow formulas, and Flow Builder displayed only the first 100 options for each type of global variable. Now you get all global variable options from anywhere in Flow Builder that supports variables. For example, you can easily display the running user's name to personalize your flow screens.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Global Variables (can be outdated or unavailable during release preview)

View Merge Field Labels in Flow Builder

Now get easy—to—read labels in the form of a pill for merge fields such as global constants and global variables. We're hiding the complexity of the merge field syntax but the syntax is still there if you need it. After you select a merge field and move to another field, the merge field's label appears. The label doesn't change the merge field value. With pills, you can click **X** to remove a merge field. The labels are available only in some areas such as logic elements, data elements, and screen component visibility.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Text Template Setting Is Saved

After you save a flow resource as either View as Rich Text or View as Plain Text, the Text Template flow resource remembers your text view setting.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, the flow resource didn't remember the text view setting that you used when you applied rich text or plain text. When you edit the flow element again after saving the flow, the flow resource now remembers the setting that you last used from the previous session. This update saves you the trouble of changing the setting every time you want to apply rich text or plain text formatting. It also prevents accidentally applying rich text formatting onto plain text.

SEE ALSO:

Salesforce Help: Flow Resource: Text Template (can be outdated or unavailable during release preview) *IdeaExchange*: Keep current type in Text Template instead of defaulting to Rich Text

Flow Screen Previews of Picklist and Multi-Select Picklist Components Are No Longer Interactive

When you add a component to a screen in Flow Builder, the component appears in the screen canvas. However, the components aren't interactive within the screen canvas. Previously, the picklist and multi-select picklist components were interactive, but not always in ways that were expected or helpful.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Lightning Flow Management: Run-Time Improvements Delivered by API Version and Triggers in the Flows List View

Control when each flow adopts run-time behavior changes. Quickly see which triggers your autolaunched flows have on the Flows page in Setup.

IN THIS SECTION:

Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience

Some run-time behavior improvements are delivered as versioned updates, so that you can specify the API version to control when each flow and process adopts those updates. Now you can test and upgrade your flows and processes one by one, and at your own pace.

Quickly See the Triggers of Your Flows on the Flows Page in Setup

Now see which trigger your autolaunched flow has with just a glance at the Flows list view in Setup. In the new Trigger column, see if a flow's trigger is a record, a schedule, or a platform event. For a record-triggered flow, see if it makes before- or after-save updates. You can also discover which trigger an autolaunched flow has by viewing the flow's detail page.

View Flow Labels and Screen Labels in Flow Interview Logs

The Flow Interview Log object includes the new Flow Label field, and the Flow Interview Log Entry object includes the new Element Label field. Include the fields in your custom reports for screen flows so your users get data that's easier to read.

Run Flows in System Context Without Sharing to Access the Recommendation Object for External Users

Now only internal users can access Recommendation object records. Previously, community, portal, and guest users had read-only access to recommendations by invoking a flow that obtained recommendation records for them. To continue those external users' access to recommendations, you can configure the flow to always run in system context without sharing. However, doing so bypasses user permissions and lets the flow create, update, and delete records that the running user can't access directly. Make sure that your flow can access only the records that are appropriate for external users. To configure a flow to always run in system context without sharing, edit the flow version properties.

Trigger Flows to Run When a Record Owner Is Changed in Salesforce Classic

When a user changes the owner of a record via Salesforce Classic, that record change can now launch a record-triggered flow. Previously, only record-owner changes that were made in Lightning Experience could launch record-triggered flows.

Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience

Some run-time behavior improvements are delivered as versioned updates, so that you can specify the API version to control when each flow and process adopts those updates. Now you can test and upgrade your flows and processes one by one, and at your own pace.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: To change the API version for running a flow or process, you need the Manage Flows permission.

Why: Previously, these types of improvements were delivered via release updates or critical updates because they can cause your existing flows and processes to stop working. But some improvements aren't critical for all flows and processes, so they're not worth the stress of testing and adopting by a specific deadline.

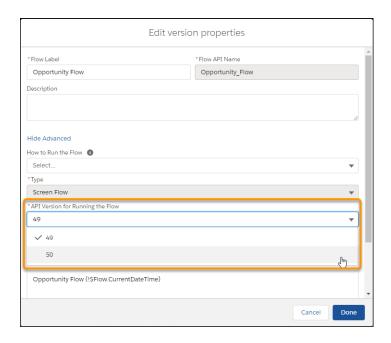
Now you can test and upgrade individual flows and processes at your convenience. You can even choose not to adopt versioned updates for one or all of your flows and processes.

Sometimes, a release update is also available as a versioned update. Such a versioned update lets you adopt the changes for individual flows or processes before the release update is enforced. After the release update is adopted or enforced, all flows and processes in your org get the updated behavior regardless of their run-time API versions.

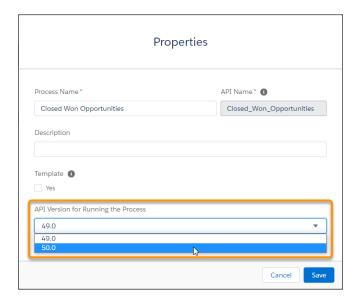
How: By default, when you create a flow or process, it's configured to run in the latest API version. That API version doesn't change as future Salesforce releases roll out. You decide when, if ever, to change the API version for running each flow or process.

Before you select a new API version, review all run-time improvements that were delivered between the currently selected API version and the new API version. You can find all flow and process run-time improvements for an API version in the Salesforce Release Notes.

To change the API version for running a flow, open it in Flow Builder. Then click to edit the version properties, and click **Show Advanced**.



To change the API version for running a process, open it in Process Builder and click **Edit Properties**.



SEE ALSO:

Flow and Process Run-Time Improvements in API Version 50.0

Quickly See the Triggers of Your Flows on the Flows Page in Setup

Now see which trigger your autolaunched flow has with just a glance at the Flows list view in Setup. In the new Trigger column, see if a flow's trigger is a record, a schedule, or a platform event. For a record-triggered flow, see if it makes before- or after-save updates. You can also discover which trigger an autolaunched flow has by viewing the flow's detail page.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

View Flow Labels and Screen Labels in Flow Interview Logs

The Flow Interview Log object includes the new Flow Label field, and the Flow Interview Log Entry object includes the new Element Label field. Include the fields in your custom reports for screen flows so your users get data that's easier to read.

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Run Flows in System Context Without Sharing to Access the Recommendation Object for External Users

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Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Which Context Do Flows Run In? (can be outdated or unavailable during release preview)

Trigger Flows to Run When a Record Owner Is Changed in Salesforce Classic

When a user changes the owner of a record via Salesforce Classic, that record change can now launch a record-triggered flow. Previously, only record-owner changes that were made in Lightning Experience could launch record-triggered flows.

Where: This change applies to Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Improve Performance With Record-Triggered Flows That Run Only for Specific Changes

Lightning Flow Extensions: Multi-Object Screen Components, Custom Uls for Screen Components and Invocable Actions, and Simplified Import of Actions via External Services (Pilot)

Have developers build screen components that work for any object you choose. Enjoy engaging UIs that developers build for the screen components and invocable actions that you add to your flows. Use external services to quickly import public API specifications, and add their actions to your flows (pilot).

IN THIS SECTION:

Create Flow Screen Components That Work for Multiple Objects (Generally Available)

Now developers can create reusable screen components that use the generic sObject and sObject[] data types. They can build one component that works for multiple objects, rather than one component for each individual object. For example, they can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

Configure Custom Flow Screen Components More Easily (Generally Available)

Developers can create custom property editors that make it a snap for you to configure flow screen components in Flow Builder. A custom property editor is simply a Lightning web component.

Configure Custom Flow Screen Components and Actions That Work for Multiple Objects More Easily

Developers can now create custom property editors for custom actions and screen components that use the generic sobject and sobject[] data types.

Easily Add Actions to Flows from Public Web Services (Pilot)

External Services can now import a limited number of specifications for public web services. Supported services include Jira, Dropbox, Instagram, Twitter, Mailchimp, eBay, Walmart, GoToMeeting, Trello, and Medium. Activate as many as 25 actions at a time for each API. Add the actions to your flow from the Action element in Flow Builder. External Services also includes support for the OpenAPI 3.0 specification and a new selector that lets you activate and deactivate specific API operations.

Create Flow Screen Components That Work for Multiple Objects (Generally Available)

Now developers can create reusable screen components that use the generic sObject and sObject[] data types. They can build one component that works for multiple objects, rather than one component for each individual object. For example, they can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

Where: This change applies to Lightning web components in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: Create a custom flow screen Lightning web component, or edit an existing one. In its configuration file, a flow screen component has the target lightning FlowScreen.

- 2. For each property that maps to the same object, set the property's type attribute to {propertyTypeName}. If the attribute expects a collection of that object, set the type attribute to {propertyTypeName[]}. For example, if propertyTypeName is T, use {T} or {T[]}.

You can reference the same property type for single and collection properties. To set the type attribute for single or collection variable properties, see the comments in the code example.

Previously, the example component was tied to one object, such as Account, Contact, or myCustomObject__c. But now developers create one component, and the Flow Builder admin chooses the object each time they use that component.



For this feature, when a flow screen component defines a generic sObject data type, custom objects that the flow references aren't included in the package automatically. To deploy the package successfully, manually add those referenced custom objects to the package.

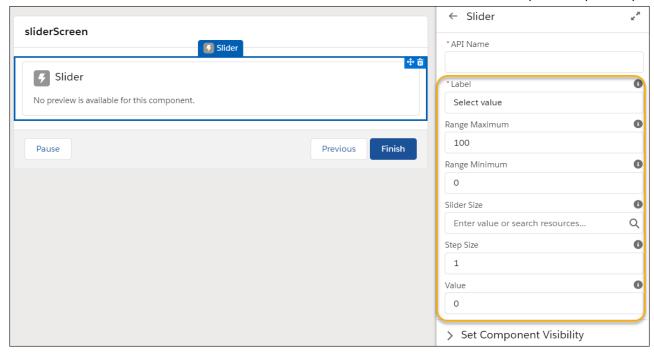
Changes Since Beta: Packaging and changes sets are now supported for flows that include a multi-object flow screen component.

Configure Custom Flow Screen Components More Easily (Generally Available)

Developers can create custom property editors that make it a snap for you to configure flow screen components in Flow Builder. A custom property editor is simply a Lightning web component.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, when you configured a custom flow screen component, the UI was composed of combo boxes. The developer who built the component had no control over the property editor UI.



Now, developers can create a custom Lightning web component that provides a clean, simple experience for you when you configure a flow screen component.



SEE ALSO:

Create Custom Property Editors for Lightning Web Components (Generally Available)

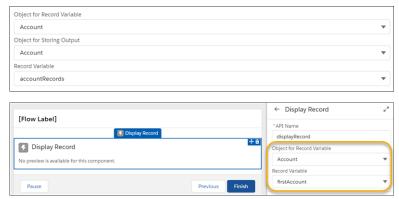
Configure Custom Flow Screen Components and Actions That Work for Multiple Objects More Easily

Developers can now create custom property editors for custom actions and screen components that use the generic sobject and sobject[] data types.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, a developer can create a custom property editor that displays a picklist component to select any collection of records, from accounts and contacts to custom objects. Previously, developers created custom property editors that worked only for one object.

The custom property editors for the custom action and screen component display picklists to select an object.



How: For each generic sObject or sObject[] input on a custom action or screen component, select a specific object.

SEE ALSO:

Create Custom Property Editors That Use Generic SObject and SObject[] Inputs in Flows

Easily Add Actions to Flows from Public Web Services (Pilot)

External Services can now import a limited number of specifications for public web services. Supported services include Jira, Dropbox, Instagram, Twitter, Mailchimp, eBay, Walmart, GoToMeeting, Trello, and Medium. Activate as many as 25 actions at a time for each API. Add the actions to your flow from the Action element in Flow Builder. External Services also includes support for the OpenAPI 3.0 specification and a new selector that lets you activate and deactivate specific API operations.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



Note: We provide External Services API Schema Enhancements to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. External Services API Schema Enhancements isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for External Services API Schema Enhancements in the External Services group in the Trailblazer Community.

If you are using or accessing the External Services API Schema Enhancements with a Developer Edition org, SFDC grants you a non-exclusive license to use the External Services API Schema Enhancements at no charge, subject to the terms of the Developer Services Master Subscription Agreement available at Agreements and Terms and in exchange for providing feedback on the External Services API Schema Enhancements. The External Services API Schema Enhancements is for evaluation purposes only, is provided as-is and exclusive of any warranty whatsoever, is not supported, and is not for use in production. You acknowledge that SFDC may discontinue this API feature at any time and may never make it available for use in production.

If you are using or accessing the External Services API Schema Enhancements ("Non-GA Service") in a sandbox, SFDC grants you a non-exclusive license to use the Non-GA Service, at no charge, subject to the terms of the Unified Pilot Research Agreement available at Agreements and Terms. The Non-GA Service is for evaluation purposes only, is provided as-is, is not supported, and is not for use in production. You acknowledge that SFDC may discontinue this Non-GA Service at any time and may never make it available for use in production.

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions

Resume paused interviews in the same context and with the same user access they had before they were paused. Let processes evaluate the original values of record fields. Improve the behaviors and effects of failed invocable actions. Enforce the running user's data access when executing flow merge fields. Respect the public access modifiers for legacy Apex actions. Cancel the "Require User Access to Apex Classes Invoked by Flow" update.

IN THIS SECTION:

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Update)

With this update enabled, paused autolaunched flows always resume in the same context and with the same user access they had before they were paused.

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Winter '22. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null.

Enable Partial Save for Invocable Actions (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Spring '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

Enforce Data Access in Flow Merge Fields (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Disable Rules for Enforcing Explicit Access to Apex Classes update, released in Summer '20, was scheduled for auto-activation (enforcement) in Spring '21, but has been postponed to Summer '21. This release update replaces the Require User Access to Apex Classes Invoked by Flow update. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

This update, released in Spring '19, was scheduled for auto-activation (enforcement) in Spring '20, but has been postponed to Spring '21. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

Stop Automated Field Updates from Suppressing Email Notifications (Previously Released Update)

This update, released in Summer '17, was scheduled for enforcement in Spring '20, but is now available only by contacting Salesforce Customer Support. For various operations, such as assigning a task to someone, you can choose to notify the affected user by email. This update stops processes, workflow rules, and Apex triggers from suppressing these email notifications.

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Update)

With this update enabled, paused autolaunched flows always resume in the same context and with the same user access they had before they were paused.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Winter '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When an autolaunched flow resumes after a time-based resume event, the flow runs in system context without sharing. The flow resumes this way regardless of the context and user access it had before it was paused. With this update enabled, flows resume in the same context and with the same permissions they had before they were paused.

For example, say that a user clicks a custom button to run an autolaunched flow, and that user doesn't have permission to edit Record A. At first, the autolaunched flow runs in user context. But after it's paused and resumed, the flow runs in system context and can edit Record A. Enabling this update prevents such flows from editing records that the running user doesn't have permission to edit.

This update affects only autolaunched flows with Pause elements that are configured to resume at a specific time.

This update improves security in your Salesforce org by preventing you from unintentionally allowing users to create or edit records they don't have access to.

How: Autolaunched flow interviews can fail if they're paused and then resumed after a time-based resume event. To avoid failed flow interviews, ensure that running users have the permissions required to execute all flow elements after each Pause element. Alternatively, you can configure autolaunched flows to always run in system context.

To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select **Release Updates**. For Make Paused Flow Interviews Resume in the Same Context with the Same User Access, follow the testing and activation steps.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Winter '22. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: This update is enforced in the Winter '22 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.

If you have a process with the **Do you want to execute the actions only when specified changes are made to the record?** option selected, or it uses the *ISCHANGED* () function in your criteria, this update could cause the process to behave differently.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions

Summer '20 Release Notes: Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

Enable Partial Save for Invocable Actions (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Spring '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Without this release update, if one invocable action fails, other invocable actions in the same transaction are rolled back. With this release update, Salesforce tries three times to execute the invocable actions that run successfully and rolls back only the invocable actions that fail to execute. This functionality is called "partial save."

Most invocable action types that are invoked via REST API are enabled with the partial save functionality. However, even with this release update, the following action types don't support partial save functionality:

- Cancel Fulfillment Order
- Cancellation Orders
- Capture Funds
- Content Workspaces
- Create Fulfillment Order
- Create Invoice from Fulfillment Order
- Create Service Report
- External Services
- Generate Work Orders
- Invocable Apex
- Skills-based Routing
- Submit Digital Form Response

Partial save can cause an external callout to occur multiple times, and external callouts can't be rolled back. Repeated external callouts can occur only when a flow is launched from a process or invoked from REST API, and that flow makes multiple attempts to execute the action that's making the external callouts.

Because partial save can make multiple attempts to execute an action, the transaction can take longer than expected. This can cause your org to reach some limits sooner than expected.

When: This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab. Before enforcement, or before you activate this release update in your production org, we recommend that you test it in a sandbox or Developer Edition org to make sure that your invocable actions work correctly. If you must work in your production org, do so during off-peak hours.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Enable Partial Save for Invocable Actions, follow the testing and activation steps.

Review any API integrations that use invocable actions to ensure they properly accommodate partial-save behavior.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions Summer '20 Release Notes: Enable Partial Save for Invocable Actions (Update, Postponed)

Enforce Data Access in Flow Merge Fields (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: With this update enabled, a flow merge field that accesses a related record respects the running user's object permissions, field-level access, and record-level access such as sharing rules.

For example, consider an org that makes contacts private unless the contact owner shares the contact explicitly with other users.

Without this update, when a user who isn't the contact owner runs a flow that uses a merge field to access a field on the contact via the Contact ID field on the case, the flow interview ignores record-level security and accesses the field.

{!caseRecord.Contact.LastName}

With this update enabled, the running user's record-level access is enforced, so that flow interview can't access the field.

How: We recommend that you test this update in a sandbox before enabling it in your production org. Test all flow paths that use merge fields to access fields on related records that have object-level security, field-level security, or record-level security. For example, test flows that use merge fields to access fields on related records that aren't shared with the running user of the flow.

To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select **Release Updates**. For Enforce Data Access in Flow Merge Fields, follow the testing and activation steps.

If you experience issues, contact Salesforce Customer Support.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions Summer '20 Release Notes: Enforce Data Access in Flow Formulas (Update, Postponed)

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: This update resolves an issue where flows don't respect the public access modifiers for legacy Apex actions. The issue affects only legacy Apex actions that reference Apex classes installed from managed packages.

Legacy Apex actions were formerly known as Apex plug-ins. When you define an Apex class that implements the Process.Plugin interface in your org, it's available in Flow Builder as a legacy Apex action.



oxdot Note: For new Apex integrations, we recommend using the InvocableMethod annotation instead of the Process. Plugin interface. This update doesn't affect invocable Apex methods.

With this update enabled:

- Flows fail when they execute public legacy Apex actions.
- Public legacy Apex actions aren't available in Flow Builder.
- Global legacy Apex actions with public describe or invoke methods are unavailable to flows in a different namespace.

Without this update, you can add public legacy Apex actions to flows even though they're not supported. Also, global legacy Apex actions with public describe or invoke methods are available to flows in a different namespace.

When: This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: We recommend that you test this update in a sandbox or developer org before activating the update in production. If you must work in your production org, do so during off-peak hours. Test all paths that contain legacy Apex action elements and make sure your flows work correctly. If a legacy Apex action is important for a business process but isn't supported with this update, contact the package developer. The developer can consider making a legacy Apex action global, or rebuilding the functionality in a new Apex class.

To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select Release Updates. For Make Flows Respect Access Modifiers for Legacy Apex Actions, follow the testing and activation steps.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions Summer '20 Release Notes: Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Disable Rules for Enforcing Explicit Access to Apex Classes update, released in Summer '20, was scheduled for auto-activation (enforcement) in Spring '21, but has been postponed to Summer '21. This release update replaces the Require User Access to Apex Classes Invoked by Flow update. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state - where users only need access to the flow to be able to run a flow that includes Apex actions.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: This update is enforced in the Summer '21 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Who: This new update is available only for orgs that have the Require User Access to Apex Classes Invoked by Flow update enabled. If you don't see the Disable Rules for Enforcing Explicit Access to Apex Classes update, you have nothing to do to comply.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Disable Rules for Enforcing Explicit Access to Apex Classes, click **Activate**. Because we're removing a requirement, enabling this update won't affect any of your existing customizations. We recommend that admins review permissions, to ensure that users who require access to Apex classes for other reasons still have access to them.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions Summer '20 Release Notes: Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

This update, released in Spring '19, was scheduled for auto-activation (enforcement) in Spring '20, but has been postponed to Spring '21. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: In processes and flows, a formula can reference a record's field via a record variable or lookup relationship field. At run-time, when the record variable or lookup relationship field is null, the formula sometimes returns null. Otherwise, it returns an unhandled exception. With this update, the formula always returns a null value when the record variable or lookup relationship field is null. This update doesn't affect merge fields.

For example, when you update an account, a process starts and checks the criteria before it performs actions. The criteria includes a formula that references the parent account's name via the account's Parent Account field. The Parent Account field is a lookup relationship field: [Account].Parent.Name.

If the value of the lookup relationship field is null, the formula returns null. Without this update, the formula sometimes returns an unhandled exception instead of null.

When: This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab..

How: To test this critical update, we recommend working in a sandbox. Test all process and flow formulas that reference lookup relationship fields or record variable fields. Processes have formulas in criteria and in actions. Flows have formulas in resources and in validation of input components. To apply this update, from Setup, in the Quick Find box, enter <code>Release Updates</code>, and select **Release Updates**. For Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas, follow the testing and activation steps.

SEE ALSO:

Release Updates

Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions Summer '20 Release Notes: Return Null Values in Process and Flow Formulas (Update, Postponed) Flow and Process Run-Time Improvements in API Version 50.0

Stop Automated Field Updates from Suppressing Email Notifications (Previously Released Update)

This update, released in Summer '17, was scheduled for enforcement in Spring '20, but is now available only by contacting Salesforce Customer Support. For various operations, such as assigning a task to someone, you can choose to notify the affected user by email. This update stops processes, workflow rules, and Apex triggers from suppressing these email notifications.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: This update is available only by contacting Salesforce Customer Support.

Why: Consider this example.

- You change a case's owner and choose to notify the new owner by email.
- You create a user and choose to welcome the user by email.
- You create a task and choose to notify the task owner by email.
- You create an assignment rule and choose to notify users when they've been assigned a case.

Prior to Summer '17, those emails didn't always go through. If the change triggered a process, workflow rule, or Apex trigger that updated the same record, Salesforce suppressed the email. When you activate this update, Salesforce no longer suppresses the notification emails.

The workaround has been to add your own email notifications, such as with an Email Alert in a process or workflow rule. If you use this workaround to make up for the missing emails and activate this update, your users receive duplicate emails. Remove your workarounds so that your users receive only one notification.

How: We recommend testing the critical update in a sandbox. If you must work in your production org, do so during off-peak hours.

- 1. Identify customizations that are sending the email notifications.
- **2.** Remove the supplemental email notifications from the customization components.
- **3.** Test your customizations to make sure that Salesforce doesn't send duplicate emails.

SEE ALSO:

Release Updates

Flow and Process Run-Time Improvements in API Version 50.0

These updates affect only flows and processes that are configured to run on API version 50.0 or later. Versioned updates let you test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Enforce each flow screen's Next or Finish control navigation setting

When **Next or Finish** is deselected in a flow screen's control navigation settings, the screen no longer displays the Next navigation option to users. For flows that run in API versions earlier than 50.0, the **Next or Finish** setting isn't always enforced. Specifically, screens always display the Next option when an element is in the flow after the screen.

Let merge fields support null record variables

Merge fields that reference record variables no longer cause errors when the record variables are null at run time. For flows that run in API versions earlier than 50.0, a merge field such as {!Account.Name} causes an error when the account record variable is null at run time.

Evaluate the ISBLANK function correctly for empty strings

In flow and process formulas, the ISBLANK function returns true for empty string or null values. In flows and processes that run in API versions earlier than 50.0, the ISBLANK function returns true only when the value is null.

Enforce the running user's data access when a flow uses a merge field

This versioned update enables the Enforce Data Access in Flow Merge Fields release update for flows that run in API version 50.0. After the release update's auto-activation, the update will be enforced for all flows regardless of their run-time API version. For more information, see Enforce Data Access in Flow Merge Fields (Update, Postponed) on page 461.

Treat invalid references to global variables as errors instead of string values

At run time, an invalid reference to a global variable now results in an error. In flows that run in API versions earlier than 50.0, invalid references to global variables are treated as string values. For example, suppose that a flow screen contains a Display Text component with this typo: Hello {!\$User.FirstNaame}! If the flow runs in API version 50.0 or later, an error occurs when the Screen element is executed. If the flow runs in an API version earlier than 50.0, your users see "Hello {!\$User.FirstNaame}!" on the screen.

SEE ALSO:

Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience

Lightning App Builder: Dynamic Forms Is Generally Available, Dynamic Actions Enhancements, and Record Page Performance Analysis

Break up your record details and create more dynamic Lightning pages with Dynamic Forms, now generally available. Discover more ways to add the flexibility and control of dynamic actions to your record pages. Get an analysis of a Lightning record page's runtime performance while you're designing it with Performance Analysis in App Builder.

IN THIS SECTION:

Break Up Your Record Details with Dynamic Forms (Generally Available)

Dynamic Forms is the next step in the evolution of Lightning record pages. It adds the ability to configure record detail fields and sections inside the Lightning App Builder. This feature, which is now generally available and enabled for everyone, includes some changes since the beta release.

Unleash New Flexibility with Dynamic Actions on Desktop (GA and Beta) and Mobile (Beta)

There are now more ways to add the flexibility and control of dynamic actions to your record pages. Dynamic actions for custom objects are GA for desktop and Beta for mobile. Dynamic actions for standard objects are Beta for desktop. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users.

Analyze Your Lightning Page Performance

Discover ways to make your record page perform better based on analysis right inside the Lightning App Builder. Performance Analysis in App Builder evaluates the fields, instances of the Related Lists component, and metadata of a record page. With the click of a button, get best practices and suggestions for improving page performance and the end-user experience.

Lightning App Builder Header and Toolbar Changes

We updated the Lightning App Builder header and toolbar and moved some items around.

Get Record Types When You Package Lightning Pages

When you add a Lightning page to a package, any record type related to that page is now included automatically.

App Performance (Beta) in Lightning App Settings Has Been Retired

The App Performance (Beta) tool, a pared down version of the Optimizer report just for Lightning record pages, has been retired. Previously, it was available from the App Settings menu when editing a Lightning App.

Lightning App Builder Accessibility Enhancements

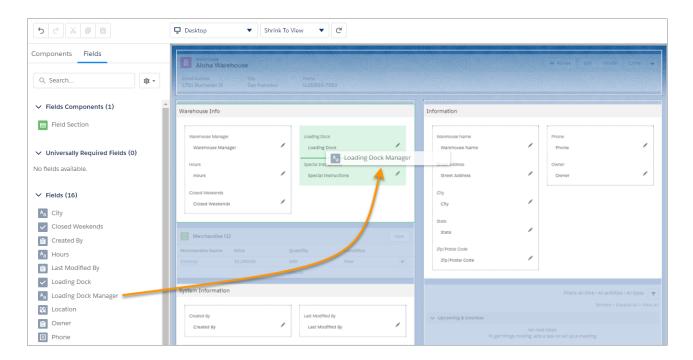
Navigate and interact more easily with items on the Lightning App Builder canvas with these accessibility improvements.

Break Up Your Record Details with Dynamic Forms (Generally Available)

Dynamic Forms is the next step in the evolution of Lightning record pages. It adds the ability to configure record detail fields and sections inside the Lightning App Builder. This feature, which is now generally available and enabled for everyone, includes some changes since the beta release.

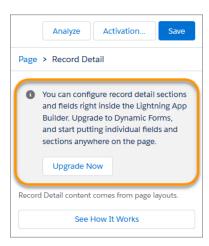
Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The more fields on your page layout, the more that the Record Detail component becomes a monolithic block of fields that you can't customize. With Dynamic Forms, you can migrate the fields and sections from your page layout as individual components into the Lightning App Builder. Then, you can configure them just like the rest of the components on the page, and give users only the fields and sections that they need.



How: Dynamic Forms is now enabled for everyone! As a result, you see new features available in the Lightning App Builder. A new Fields tab in the component palette contains Field and Field Section components, which are the building blocks for Dynamic Forms. And as you configure fields and sections, you get help from in-app tips, created just for Dynamic Forms-driven pages.

How do you get started? Open an existing record page in the Lightning App Builder, then click **Upgrade Now** from the Record Detail properties pane to launch the Dynamic Forms migration wizard. With only a few clicks, the wizard adds fields and field sections to the page for you.



Migration isn't the only path, however. You can also build your pages from scratch. Create a fresh Lightning record page, then drag fields and sections anywhere you want onto the page.



Note: Dynamic Forms is supported on record pages for custom objects only.

Changes Since Beta:

- Dynamic Forms is now on for everyone in supported editions. The ability to turn it on and off for your org from the Record Page Settings node in Setup is removed.
- Universally required fields moved to their own section of the palette and have distinctive icons.
- Packaging is now supported for pages that contain Dynamic Forms components (Field, Field Section).
- Enhanced support for Dynamic Forms during edit, create, and clone.
- Several limitations and known issues are resolved.

SEE ALSO:

Salesforce Help: Break Up Your Record Details with Dynamic Forms

Unleash New Flexibility with Dynamic Actions on Desktop (GA and Beta) and Mobile (Beta)

There are now more ways to add the flexibility and control of dynamic actions to your record pages. Dynamic actions for custom objects are GA for desktop and Beta for mobile. Dynamic actions for standard objects are Beta for desktop. Assign actions in the Lightning App Builder instead of the page layout, and apply filters to control when and where actions appear for users.

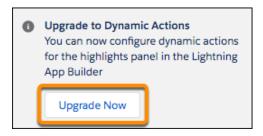
Where: This change applies to Lightning Experience desktop and the Salesforce mobile app in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.



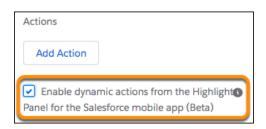
Note: As beta features, Dynamic Actions for standard objects on desktop and Dynamic Actions for custom objects in the Salesforce Mobile App are previews and aren't part of the "Services" under your master subscription agreement with Salesforce. Use either of these features at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of either of these features within any particular time frame or at all, and we can discontinue either feature at any time. These features are for evaluation purposes only, not for production use. These features are offered as is and aren't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with them. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce

Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Dynamic Actions in the Dynamic Forms & Actions group in the Trailblazer Community.

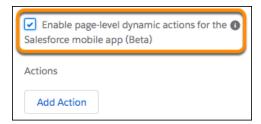
How: To enable dynamic actions for a custom object on desktop, add or select the Highlights Panel component on a custom object's record page. In the Highlights Panel properties pane, click **Upgrade Now** and step through the migration assistant to migrate actions or start with new ones.



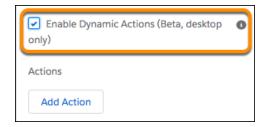
To assign the same actions for the custom object on mobile as on desktop, in the properties pane select **Enable dynamic actions from the Highlights Panel for the Salesforce mobile app (Beta)**.



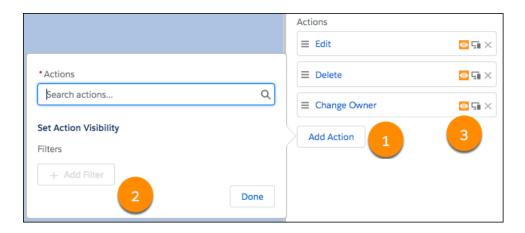
If you want to use a different set of dynamic actions on mobile, or if you have a mobile-only Lightning page, you can enable dynamic actions for mobile via the Page properties on the record page. Create or open a record page for a custom object in the Lightning App Builder. In the Page properties pane, select **Enable page-level dynamic actions for the Salesforce mobile app (Beta)**.



To enable dynamic actions for a standard object on desktop, add or select the Highlights Panel component on the object's record page. In the Highlights Panel properties pane, select **Enable Dynamic Actions (Beta, desktop only)**.



To add an action in any of the dynamic action scenarios, click **Add Action** (1) in the properties pane. In the Actions modal, choose an action and click **Add Filter** (2) to assign visibility rules based on record field, device type, and other filters. An eye icon an action's name indicates that visibility rules are applied. If you migrated actions from a page layout, you can modify them in the Actions modal.

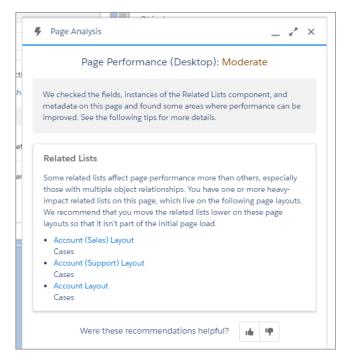


Analyze Your Lightning Page Performance

Discover ways to make your record page perform better based on analysis right inside the Lightning App Builder. Performance Analysis in App Builder evaluates the fields, instances of the Related Lists component, and metadata of a record page. With the click of a button, get best practices and suggestions for improving page performance and the end-user experience.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To view the assessment of your page's performance, click **Analyze** from the Lightning App Builder toolbar.



Performance Analysis in App Builder is available for desktop record pages only.

We want to know what you think of the recommendations. Run an analysis, and let us know using the feedback feature included in the footer of the prompt.

Lightning App Builder Header and Toolbar Changes

We updated the Lightning App Builder header and toolbar and moved some items around.

Where: This change applies to Salesforce Classic and Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In the header, we moved the Back button to the far left (1).

In the toolbar, the Refresh button is now a simple arrow icon (2). Also, we added an Analyze button to record pages for the new Performance Analysis in App Builder (3). Lastly, we switched the places and colors of the Save and Activation buttons (4). The Save button is now the rightmost button and is blue, and the Activation button is now white.



SEE ALSO:

Analyze Your Lightning Page Performance

Get Record Types When You Package Lightning Pages

When you add a Lightning page to a package, any record type related to that page is now included automatically.

Where: This change applies to Salesforce Classic and Lightning Experience in Group, Essentials, Professional, Enterprise, Performant Predictions Unlimited, and Developer editions.

App Performance (Beta) in Lightning App Settings Has Been Retired

The App Performance (Beta) tool, a pared down version of the Optimizer report just for Lightning record pages, has been retired. Previously, it was available from the App Settings menu when editing a Lightning App.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The Lightning page performance assessments from the retired tool were enhanced and distilled into a new feature, Performance Analysis in App Builder.

SEE ALSO:

Analyze Your Lightning Page Performance

Lightning App Builder Accessibility Enhancements

Navigate and interact more easily with items on the Lightning App Builder canvas with these accessibility improvements.

Where: This change applies to Salesforce Classic and Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Tabbing between regions or components no longer moves focus to invisible items.

When a region or component is selected, the icons for inserting a component (3) and the action icons (4 are now available as Tab key targets within the selected item.

On record pages that use Dynamic Forms, the text inside Field Section components is now available as a Tab key target. You can select **Add Field(s) Here** with the Tab key, press **Enter**, and then add fields.

And when you use the keyboard or mouse to select **Get more on the AppExchange** in the component palette as a focus target, it now changes color for increased visibility.

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric Predictions

Einstein Recommendation Builder delivers personalized, Al-driven recommendations of anything to anyone. Einstein Prediction Builder supports record-level insights for numeric predictions.

IN THIS SECTION:

Recommend Anything to Anyone with Einstein Recommendation Builder (Beta)

Deliver Al-driven, personalized recommendations to customers by matching records from one Salesforce object to another. For example, recommend the best products for an account. Tell Einstein which Salesforce objects to learn from, customize your settings, and put your Einstein recommendation to work in a Next Best Action strategy.

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric

Einstein Prediction Builder: Become an Expert on Your Prediction Results in an Action-Packed Scorecard

rediction:

Make more informed decisions about your business with the redesigned, interactive scorecard in Einstein Prediction Builder. Get actionable advice on when to enable your prediction and what you can do to improve its quality. Before your prediction is running on live data, find out how well it's likely to perform.

Einstein Prediction Builder: Test Your Prediction's Performance Interactively

You built your prediction and got your results. Was Einstein correct? The Distribution of Results graph in your scorecard tells you what percentage of scores are correct and incorrect. Use the interactive slider to test your prediction's performance at different score thresholds to help you make optimal use of your results.

Show Top Predictors and Confidence Range on Records for Numeric Predictions

The same Einstein Predictions component that shows top predictors on records for yes/no predictions is now available for numeric predictions. Einstein also shows you the confidence range of the prediction score. Find out which predictors influence individual scores the most.

SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Recommend Anything to Anyone with Einstein Recommendation Builder (Beta)

Deliver Al-driven, personalized recommendations to customers by matching records from one Salesforce object to another. For example, recommend the best products for an account. Tell Einstein which Salesforce objects to learn from, customize your settings, and put your Einstein recommendation to work in a Next Best Action strategy.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.



Note: As a beta feature, Einstein Recommendation Builder is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. During the beta period, you can use unlimited Einstein recommendations. When Einstein Recommendation Builder becomes Generally Available, usage limits are subject to change. You can provide feedback and suggestions for Einstein Recommendation Builder in the IdeaExchange. For information on participating in the beta program and enabling this feature in your org, contact your Salesforce representative.

Who: This feature is available to admins with the Service Cloud Einstein and Lightning Platform Plus licenses.

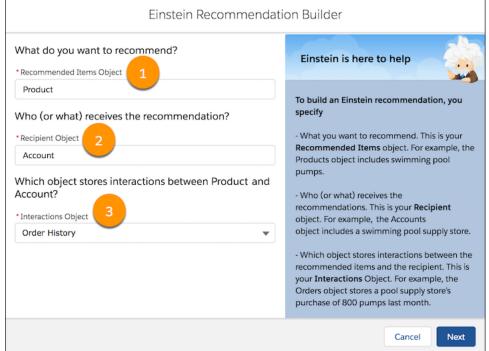
How: From Setup, search for and select Einstein Recommendation Builder. Click New Recommendation.

Einstein recommendations are based on three interrelated Salesforce objects:

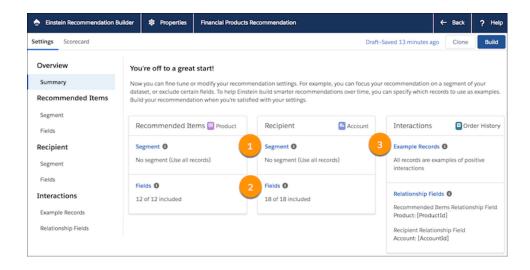
- The **Recommended Items** object (1) contains the records that you want to recommend. For example, you can recommend financial products, which are stored on your Product object.
- The **Recipient** object (2) contains the records that receive the recommendation. For example, maybe you're recommending financial products to small businesses, which are stored on your Account object.
- The **Interactions** object (3) is where Einstein can find stored interactions between the Recommended Items and Recipient objects. When an account purchases a product, that interaction could be stored on the Order History object.

Recommendation Builder supports all custom objects and most standard objects.

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric Predictions

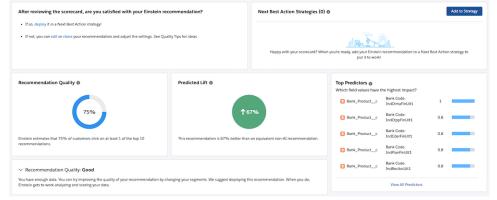


On the Summary page, you can dive into each object to create segments, exclude fields, and specify which records are examples of positive and negative interactions.

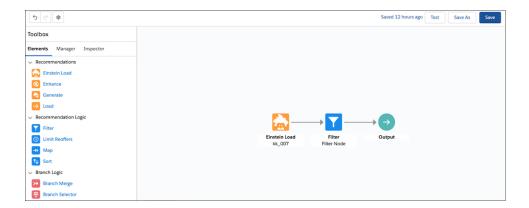


After your recommendation is built, review its scorecard to see how well it performs.

Einstein Builders: Deliver Personalized Recommendations (Beta), Test Your Prediction's Performance, and Show Confidence Range and Top Predictors on Records for Numeric Predictions



When you're happy with your results, deploy your Einstein recommendation to a Next Best Action strategy! Use Strategy Builder to seamlessly combine business policies with Einstein recommendations. For example, add rules to determine when certain recommendations are shown, or to filter out specific Einstein recommendations.



SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Einstein Prediction Builder: Become an Expert on Your Prediction Results in an Action-Packed Scorecard

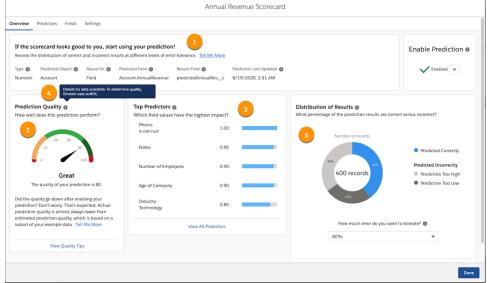
Make more informed decisions about your business with the redesigned, interactive scorecard in Einstein Prediction Builder. Get actionable advice on when to enable your prediction and what you can do to improve its quality. Before your prediction is running on live data, find out how well it's likely to perform.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

When: The Distribution of Results graph and the ability to test your prediction's performance will be available soon after the Winter '21 release. Check back here for updates.

Who: This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, EinsteinBuilderFree, or Platform Plus license.

How: Access your prediction's scorecard from the Predictions list view in Einstein Prediction Builder Setup.

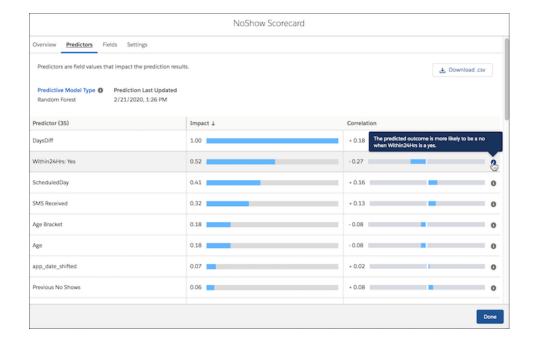


The top of the Overview tab (1) gets right to the point. Enable this prediction, or see if you can improve its quality first. Look under the quality gauge (2), understand what "quality" means and how you can improve it.

The top of each chart (3) tells you what question it answers. Hover tips everywhere (4) tell you what you're looking at and how to use it.

The Distribution of Results (5) graph shows you what percentage of predicted results turned out to be correct versus incorrect for each type of outcome. Not only can you get this insight after you start using your prediction results, but you can even get estimated results based on your example data. Use the interactive slider to test your prediction's performance at different score thresholds.

The Predictors tab makes it easier to see the impact and correlation for each predictor, so you can know where to focus your efforts.



SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Einstein Prediction Builder: Test Your Prediction's Performance Interactively

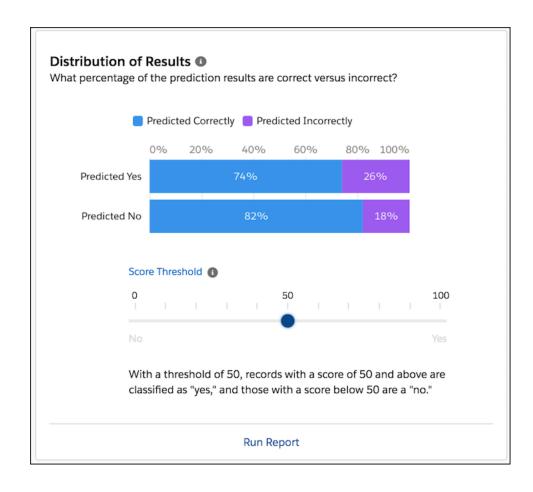
You built your prediction and got your results. Was Einstein correct? The Distribution of Results graph in your scorecard tells you what percentage of scores are correct and incorrect. Use the interactive slider to test your prediction's performance at different score thresholds to help you make optimal use of your results.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

When: The Distribution of Results graph and the ability to test your prediction's performance will be available soon after the Winter '21 release. Check back here for updates.

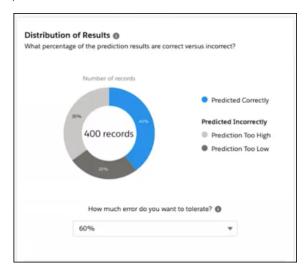
Who: This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, EinsteinBuilderFree, or Platform Plus license.

How: On your prediction's scorecard, see the Distribution of Results graph. For a yes/no prediction, the graph tells you what percentage of yes and no predictions are correct versus incorrect. When (Estimated) is in the title, it's because the prediction isn't yet running on live data or Einstein is waiting for more results.



But that's not even the best part! What's even cooler is that you can test how well your prediction performs (or can perform) at diffe**Predictions** score thresholds. A score threshold of 50 means you consider scores of 50 and above to be a yes and below 50 a no. Drag the slider up and down to test correct versus incorrect results at other thresholds to help you decide what to consider a yes and no result.

For numeric predictions, use a similar graph to see what percentage of predictions are predicted correctly, too low, and too high. Set your error tolerance to different levels to see how it affects your results. How much error you're willing to tolerate depends on your particular use case. Use this information to decide what actions to take based on your prediction results.



SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

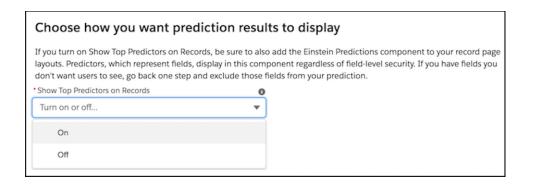
Show Top Predictors and Confidence Range on Records for Numeric Predictions

The same Einstein Predictions component that shows top predictors on records for yes/no predictions is now available for numeric predictions. Einstein also shows you the confidence range of the prediction score. Find out which predictors influence individual scores the most.

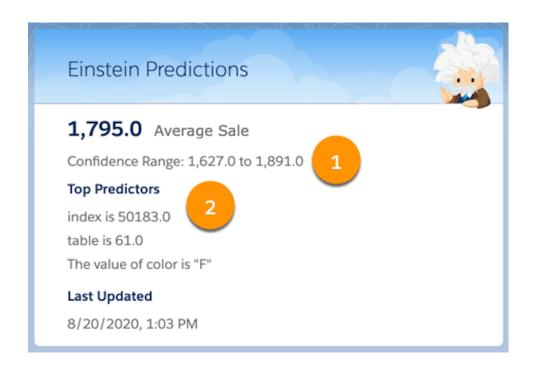
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or Platform Plus license.

How: When you build your numeric prediction, on the page where you name the custom field that stores your prediction results, set Show Top Predictors on Records to **On**.



Add the Einstein Predictions component to all the record page layouts where you want to show top predictors. Configure the component for the prediction that you want. When you view a record that has a prediction score, you can see the Einstein Predictions component on the record page with the top predictors that influence the score. The confidence range (1) indicates how low and how high the actual score could be. The top predictors (2) show which field values influence the score the most.





Note: The Einstein Predictions component is available only with the paid version of Einstein Prediction Builder.

SEE ALSO:

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Salesforce Help: Show Top Predictors on Records (can be outdated or unavailable during release preview)

Globalization: Translation Import and Export Improvements, New Locale Formats, and a New Platform Language

If a translation import has errors, the email you receive provides more detail and includes the error log as an attachment. Data translation import and export limits are increased, and you can export data translation files for specific languages. Enable new and improved formats for international dates and times via an update. Plus, we added Khmer as a platform-only language.

IN THIS SECTION:

Understand Translation Import Errors with Improved Email Notifications

If you get errors when importing translation files, you can now understand and resolve them more quickly. The error notification email you receive provides more information and the error log as an attachment.

Enable ICU Locale Formats (Previously Released Update)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

Connect with Customers Who Speak and Read Khmer

Khmer is now available as a platform-only language. Plus, the date formats changed for the Khmer (Cambodia) locale.

Import and Export Larger Data Translation Files

Translate larger amounts of the data stored in the B2B Commerce Product and Product Category objects' fields with increased import and export limits. When exporting data translation files, you can filter by language to reduce the file size. And the email notifying you that your data translation export is complete contains more information and a link to your exported file.

Submit Only One Translation Import or Export Request at a Time

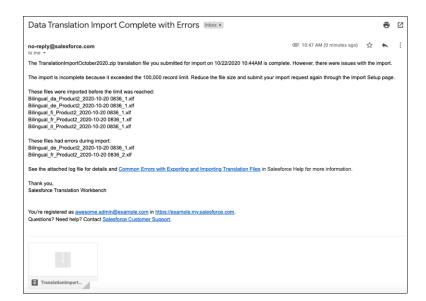
To prevent performance degradation, each user can only have one translation import request running at a time. And each user can only have one metadata and one data translation export request running simultaneously.

Understand Translation Import Errors with Improved Email Notifications

If you get errors when importing translation files, you can now understand and resolve them more quickly. The error notification email you receive provides more information and the error log as an attachment.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions. Data Translation applies to B2B Commerce in Lightning Experience.

Why: If the imported .zip file exceeds translation import limits, the email lists the files that were imported before the limit was reached. If records within the imported translation files weren't processed, the email lists those files and a link to Salesforce Help. Plus, the error log is attached to the email for easy access.



SEE ALSO:

Salesforce Help: Manage Your Translations (can be outdated or unavailable during release preview)

Enable ICU Locale Formats (Previously Released Update)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions, except Database.com.

When: Salesforce enforces this update in Spring '22. Salesforce orgs created in Winter '20 or later have ICU locale formats enabled by default. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: Before enabling this update in production, check with your package providers to make sure that all your installed packages are compatible with the ICU formats. Then evaluate the new locales' impact to your Salesforce org. Use this SOQL query to find the locales in use in your org and a user count for each locale.

SELECT toLabel(LocaleSidKey) LocaleName, LocaleSidKey, Count(id) UserCount FROM User where IsActive=true GROUP BY LocaleSidKey

See the documentation for recommended areas of testing and details on the changes for each locale.

To enable this update, from Setup, in the Quick Find box, enter Release Updates, then select **Release Updates**. For Enable ICU Locale Formats, follow the testing and activation steps.

The English (Canada) locale (en_CA) requires separate activation. In the Quick Find box, enter <code>User Interface</code>, then select <code>User Interface</code>. Select <code>Enable ICU</code> formats for en_CA locale and click <code>Save</code>.



Note: Applying this update displays the new locale formats in the UI. The ICU formats are available in API version 45.0 and later.

SEE ALSO:

Salesforce Help: Go Global with New International Locale Formats (can be outdated or unavailable during release preview)

Winter '20 Release Note: Enable ICU Locale Formats (Release Update)

Release Updates

Connect with Customers Who Speak and Read Khmer

Khmer is now available as a platform-only language. Plus, the date formats changed for the Khmer (Cambodia) locale.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions.

Why: These date formats for the Khmer (Cambodia) locale are updated.



Note: We recommend viewing this information in the Release Notes portal (https://releasenotes.docs.salesforce.com/). Not all characters appear correctly in PDFs.

FORMAT TYPE	KHMER (CAMBODIA) WINTER '21 FORMAT	KHMER (CAMBODIA) SUMMER '20 FORMAT
Date Time: Medium	28 2008, 4:30:05 PM	28 Jan 2008, 4:30:05 PM
Date: Medium	28 2008	28 Jan 2008

FORMAT TYPE	KHMER (CAMBODIA) WINTER '21 FORMAT	KHMER (CAMBODIA) SUMMER '20 FORMAT
Date: Long	28 2008	28 January 2008

SEE ALSO:

Salesforce Help: Supported Languages (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce Supported Locales and ICU Formats (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce Supported Locales and JDK Formats (can be outdated or unavailable during release preview)

Import and Export Larger Data Translation Files

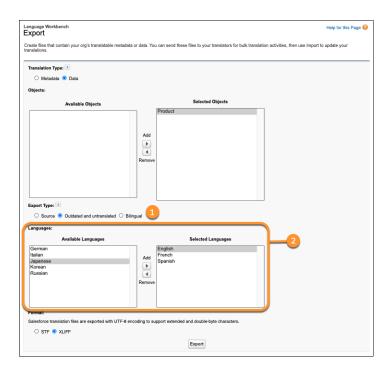
Translate larger amounts of the data stored in the B2B Commerce Product and Product Category objects' fields with increased import and export limits. When exporting data translation files, you can filter by language to reduce the file size. And the email notifying you that your data translation export is complete contains more information and a link to your exported file.

Where: This change applies to B2B Commerce in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: To allow for the larger data sets required with data translation, we increased the limits on importing and exporting data translation files.

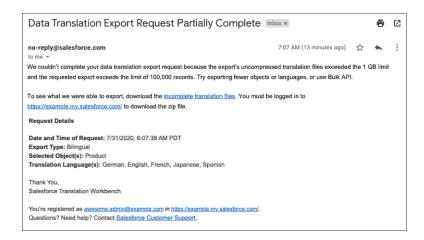
- Each data translation export request is limited to 1 GB of data and 100,000 records. If your requested export exceeds either of those limits, only a partial file is exported.
- When exporting data translation files, individual uncompressed files are limited to 25 MB per file. If the data per object and language combination exceeds that limit, each file name is date stamped and incremented. For example,
 Bilingual_de_Product2_2020-10-20 0836_1.xlf and Bilingual_de_Product2_2020-10-20 0836 2.xlf.
- When importing data translation files, individual uncompressed files are limited to 50 MB each.
- When zipping data translation files for import, each .zip file can contain up to 100,000 translation records within up to 2 GB of uncompressed files. After the contents are compressed, each .zip file is limited to 1 GB. Create multiple .zip files as needed.

To help reduce the size of your zipped translation file exports, you can now select which languages to include in exported data translation files.



When you select the Bilingual or Outdated and untranslated export type (1) for a data translation export, the language filter (2) appears.

When your export is complete, you receive an email with the export details, including the date and time of the request. That email contains a link to the exported files. If your request exceeds the export limits, the translation import notification email includes the exceeded limit and a link to the partial file.



SEE ALSO:

Salesforce Help: Manage Your Translations (can be outdated or unavailable during release preview)

Submit Only One Translation Import or Export Request at a Time

To prevent performance degradation, each user can only have one translation import request running at a time. And each user can only have one metadata and one data translation export request running simultaneously.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions. Data Translation applies to B2B Commerce.

Why: When you submit a translation file for import, you must wait for that import process to finish. If you submit another translation import request while your first request is still running, you receive an email instructing you to resubmit your request.

With translation export requests, each user can run one process per translation type simultaneously. For example, when you request a metadata translation export, you must wait for that process to finish. If you submit another metadata translation export request before that, you see an error message on the Export Setup screen.

As before, you receive an email when each of your requested translation import and export processes is complete.

SEE ALSO:

Salesforce Help: Translation Workbench (can be outdated or unavailable during release preview)

Profiles and Permissions: More Granular Control for Security and a New License Option

Improve your Salesforce org security with new options to restrict permission cloning and to limit the profiles that users can see. Subscribed to a Salesforce managed package? See which customer permissions in the package require a Salesforce license to access them.

IN THIS SECTION:

Improve Org Security with the Profile Filter Option

Keep your Salesforce org as secure as possible. Limit users from viewing any profile names other than their own.

Check Out the View All Profiles Permission

Use the View All Profiles permission when you enable the Profile Filtering option in User Management Settings. Enable View All Profiles only for the users who require the ability to view all profiles in your Salesforce org.

Restrict Permissions Cloning in Profiles

Use the Restricted Profile Cloning option to ensure that only permissions accessible to your org are enabled when you clone profiles. If you don't enable this setting, all permissions currently enabled in the source profile are also enabled for the cloned profile, even if your org can't currently access them.

Use Permission Set Groups in Professional Edition

If you use Professional Edition, you can now create up to 10 permission set groups in your Salesforce org. The ability to use permission set groups also means that Professional Edition Salesforce orgs can adopt packages that use permission set groups. The limit for installed managed permission sets from AppExchange packages is 1,000, It's the same for all editions that allow permission set groups. Previously, permission set groups weren't available in Professional Edition.

Understand the Custom Permissions License Required Option

If you use Salesforce managed packages, you can check if custom permissions require Salesforce licenses.

Improve Org Security with the Profile Filter Option

Keep your Salesforce org as secure as possible. Limit users from viewing any profile names other than their own.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, Developer editions, and Database.com editions.

Why: If profile filtering is disabled, users can see all profile names in your org, regardless of which permissions they have. If you enable profile filtering, you can restrict who sees profile information to the users who require the access for their job roles. To allow selected users to view all org profiles, you can enable the View All Profiles permission for them.

- [] Important: Profile names are also exposed when users with permissions to perform the following tasks take these actions:
 - Create a tab or record type with a wizard step that includes the assignment of tabs and record types to profiles.
 - Configure a login flow where viewing profile lists is required to make flow associations.
 - Set up delegated admins where looking up profiles is needed to identify assignable profiles.
 - Administer an org as a delegated external user admin.
 - Administer an org as a delegated admin to view and assign profiles of the delegated group.

How: From Setup, in the Quick Find box, enter User, then select User Management Settings. Enable Profile Filtering.

Check Out the View All Profiles Permission

Use the View All Profiles permission when you enable the Profile Filtering option in User Management Settings. Enable View All Profiles only for the users who require the ability to view all profiles in your Salesforce org.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, Developer editions, and Database.com editions.

How: When creating a profile or permission set, select View All Profiles.

Restrict Permissions Cloning in Profiles

Use the Restricted Profile Cloning option to ensure that only permissions accessible to your org are enabled when you clone profiles. If you don't enable this setting, all permissions currently enabled in the source profile are also enabled for the cloned profile, even if your org can't currently access them.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, Developer editions, and Database.com editions.

Why: Let's say that you previously enabled Quotes in your org, so the Standard User profile has access to the feature. If you disable Quotes, then object permissions related to the feature, such as Quotes, Products, and Price Books, are no longer accessible from the Standard User profile. If you clone the Standard User profile and enable Quotes again, both the Standard User profile and the cloned profile have the relevant object permissions enabled.

You might intend to enable Quotes for both the Standard User profile and the cloned profile. But cloned profiles typically have different purposes than the profiles they are cloned from. To ensure that only the intended profiles receive permissions for specific functionality, enable **Restricted Profile Cloning**.

How: From Setup, in the Quick Find box, enter User, then select User Management Settings. Select Restricted Profile Cloning.

Use Permission Set Groups in Professional Edition

If you use Professional Edition, you can now create up to 10 permission set groups in your Salesforce org. The ability to use permission set groups also means that Professional Edition Salesforce orgs can adopt packages that use permission set groups. The limit for installed managed permission sets from AppExchange packages is 1,000, It's the same for all editions that allow permission set groups. Previously, permission set groups weren't available in Professional Edition.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional Edition.

Understand the Custom Permissions License Required Option

If you use Salesforce managed packages, you can check if custom permissions require Salesforce licenses.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When viewing a custom permission, check if the **License Required** option is selected. When this option is selected, you must acquire the appropriate Salesforce license before accessing the permission.

Salesforce Connect: Restricted Access, HIPAA Compliance, and ID Mapping Limits

We're restricting edit access to certain sensitive fields on external data sources and named credentials. Salesforce Connect is now Health Insurance Portability and Accountability Act (HIPAA) compliant, ensuring that all personally identifiable healthcare information is protected from fraud and theft. We're also keeping ID mappings up to date by enforcing a process that deletes all external object record IDs that haven't been viewed within 365 days.

Available in: **Developer** Edition

Available for an extra cost in: Enterprise, Performance, and Unlimited Editions

IN THIS SECTION:

Restricted Access to Authentication in Named Credentials and External Data Source

When the URL endpoint of a named credential or an external data source that uses per user authentication is edited, users are now required to re-authenticate against the endpoint.

Salesforce Connect is HIPAA Compliant

Salesforce Connect is now covered under the Health Insurance Portability and Accountability Act (HIPAA). HIPAA ensures that all personally-identifiable information maintained by healthcare industries is protected from fraud and theft.

External Object ID Mappings Subject to Expiration

We enabled a process to delete all IDs not viewed after 365 days, except where the ID mapping has customer data attached to it. To view records in Lightning Experience, Salesforce Connect maps the external ID of each record to a Salesforce ID. Your org can map up to 100,000 new external object record IDs an hour. This is an existing limit that's available in the Limits API.

Restricted Access to Authentication in Named Credentials and External Data Source

When the URL endpoint of a named credential or an external data source that uses per user authentication is edited, users are now required to re-authenticate against the endpoint.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, Developer, and Performance editions.

How: Grant access to users through permission sets and profiles in Setup. Doing so lets users set up and manage their own authentication settings for accessing the external system.

SEE ALSO:

Salesforce Object Reference Guide: External Data Source (can be outdated or unavailable during release preview)
Salesforce Object Reference Guide: Named Credential (can be outdated or unavailable during release preview)

Salesforce Connect is HIPAA Compliant

Salesforce Connect is now covered under the Health Insurance Portability and Accountability Act (HIPAA). HIPAA ensures that all personally-identifiable information maintained by healthcare industries is protected from fraud and theft.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, Developer, and Performance editions.

SEE ALSO:

Salesforce Help:Salesforce Connect

External Object ID Mappings Subject to Expiration

We enabled a process to delete all IDs not viewed after 365 days, except where the ID mapping has customer data attached to it. To view records in Lightning Experience, Salesforce Connect maps the external ID of each record to a Salesforce ID. Your org can map up to 100,000 new external object record IDs an hour. This is an existing limit that's available in the Limits API.

Where: This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited Editions.

SEE ALSO:

Salesforce Help: General Limits for Salesforce Connect—OData 2.0 and 4.0 Adapters (can be outdated or unavailable during release preview)

Einstein Next Best Action: HIPAA Compliance, Event-Driven Recommendations Based on Call State Changes, and Al-Driven Recommendations Generated by Einstein Recommendation Builder

Store and process protected health information. Create recommendations based on call record field values. Use the new Einstein Load element to deliver personalized recommendations.

EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

IN THIS SECTION:

Store and Encrypt Healthcare Data with HIPAA-Compliant Einstein Next Best Action

As of Winter '21, Next Best Action is certified as in compliance with the Health Insurance Portability and Accountability Act (HIPAA). This certification means that Next Best Action now

meets the strict HIPAA standards for storing and processing customers' protected health information (PHI). HIPAA compliance positions Next Best Action to provide future capabilities in the highly regulated healthcare and life sciences sector.

Create Event-Driven Recommendations Using Voice Call Records

Empower your service agents with contextual, event-driven recommendations based on information in Voice Call records and call transcripts. Build solutions using events for call state changes such as start call, mute, and hold. Use APIs in the Service Cloud Voice Toolkit to push context-sensitive recommendations based on field values in the call record and keywords in the call transcript.

Add Al-Driven Recommendations to Your Strategies Using Einstein Recommendation Builder (Beta)

There's a new load element in town and it's about to make your strategies even smarter! Use the new Einstein Load element to add Al-driven recommendations, generated by Einstein Recommendation Builder, to your Next Best Action strategies. Einstein learns from past data and user responses to help deliver personalized recommendations to your users.

Store and Encrypt Healthcare Data with HIPAA-Compliant Einstein Next Restraction Builder

As of Winter '21, Next Best Action is certified as in compliance with the Health Insurance Portability and Accountability Act (HIPAA). This certification means that Next Best Action now meets the strict HIPAA standards for storing and processing customers' protected health information (PHI). HIPAA compliance positions Next Best Action to provide future capabilities in the highly regulated healthcare and life sciences sector.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Encrypt the Next Best Action Recommendation Description Field *Trailhead*: Shield Platform Encryption

Create Event-Driven Recommendations Using Voice Call Records

Empower your service agents with contextual, event-driven recommendations based on information in Voice Call records and call transcripts. Build solutions using events for call state changes such as start call, mute, and hold. Use APIs in the Service Cloud Voice Toolkit to push context-sensitive recommendations based on field values in the call record and keywords in the call transcript.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license.

SEE ALSO:

Recommend the Next Best Action for Agents with the Service Cloud Voice Toolkit API (Generally Available)

Add Al-Driven Recommendations to Your Strategies Using Einstein Recommendation Builder (Beta)

There's a new load element in town and it's about to make your strategies even smarter! Use the new Einstein Load element to add Al-driven recommendations, generated by Einstein Recommendation Builder, to your Next Best Action strategies. Einstein learns from past data and user responses to help deliver personalized recommendations to your users.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.



Note: As a beta feature, Einstein Recommendation Builder is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Einstein Recommendation Builder in the IdeaExchange.

Who: This feature is available to admins with the Service Cloud Einstein, Lightning Platform Plus, and Lightning Field Service Plus licenses.

SEE ALSO:

Recommend Anything to Anyone with Einstein Recommendation Builder (Beta)

External Services: Check External Services Version and Recreate Legacy Registrations to Get Ready for Retirement of Legacy External Services in Summer '21

Check your External Services version for Legacy External Services, and recreate legacy registrations to current External Services registrations. Legacy External Services is scheduled for retirement in Summer '21.

IN THIS SECTION:

Manage and Recreate Legacy External Services Registrations

Now it's easy to identify Legacy External Services registrations and then recreate them to the current External Services version. Significant improvements over Legacy External Services include simplified upgrading of legacy registrations, cloning existing registrations, and better error messaging and error recovery.

Legacy External Services Version Is Being Retired

Legacy External Services and support for legacy registrations is scheduled for retirement in Summer '21. As part of the effort to move to a single version support model, other changes include eliminating the ability to edit legacy registrations and introducing a simple workflow to recreate registrations from legacy to the current version. Retiring legacy registrations ensures that all registrations can benefit from current and future product enhancements and features.

Manage and Recreate Legacy External Services Registrations

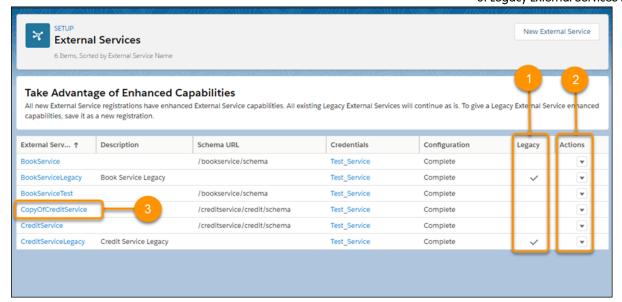
Now it's easy to identify Legacy External Services registrations and then recreate them to the current External Services version. Significant improvements over Legacy External Services include simplified upgrading of legacy registrations, cloning existing registrations, and better error messaging and error recovery.



Note: Legacy registrations were either registered in the OpenAPI format or in the Interagent hyper-schema format. You can recreate OpenAPI 2.0 legacy registrations as current External Services. For Interagent hyper-schema registrations, you must convert them to OpenAPI format first and then add them as a new service.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions.

How: To find your registered services, go to Setup, in the Quick Find Box, enter External Services, and then select External Services. To identify external service registrations using Legacy External Services, see checkmarks in Legacy column (1). Choose an action for your external service registration from the actions column (2). An example of a registered service recreated using **Save As** with the provided prefix of **CopyOf** in front of the name (3). Remember to change the name to something more descriptive of the service.



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Note: Actions available for legacy registrations are **Save As**, **Delete**, and **View Actions**. The **Save As** action only supports OpenAPI 2.0 compliant legacy registrations. Use **Save As** to recreate a legacy registration to the current version.

See the documentation on how to recreate legacy registrations to the current External Services version:

Legacy External Services Version Is Being Retired

Legacy External Services and support for legacy registrations is scheduled for retirement in Summer '21. As part of the effort to move to a single version support model, other changes include eliminating the ability to edit legacy registrations and introducing a simple workflow to recreate registrations from legacy to the current version. Retiring legacy registrations ensures that all registrations can benefit from current and future product enhancements and features.

Where: This change applies to orgs with the Legacy External Services version in Lightning Experience, Enterprise, Performance, Unlimited, and Developer Editions. In Spring '21, Salesforce will no longer support legacy external services registrations.

How: Starting in Winter '21, no new Legacy External Service registrations are allowed, and you can't edit Legacy External registrations in OpenAPI format.

For OpenAPI 2.0 legacy registrations: Recreate legacy registrations to the current External Services version with the **Save As** action from the External Services main page.

For Interagent hyper-schema format legacy registrations: As soon as it's practical for your organization, Salesforce recommends that you convert Interagent hyper-schema legacy registrations to OpenAPI format and add them as a new external service.

Review our documentation and follow the instructions for identifying and recreating Legacy External Services registrations.

SEE ALSO:

External Services Versions: Legacy and Current Edit, Delete, Save As, and View an External Service

Sharing: Metadata API Deployment Improvements and Secure Guest User Sharing Settings

You can now deploy organization-wide defaults and criteria-based or guest user sharing rule changes through the Metadata API at the same time. To safeguard your Salesforce org's data, we enabled the Secure guest user record access setting in all orgs with communities or sites. This setting can't be disabled.

IN THIS SECTION:

Deploy Organization-Wide Defaults and Criteria-Based Sharing Rules Together

You can now simultaneously update the sharingModel field for an object and create new criteria-based or guest user sharing rules via the Metadata API. Previously, you deployed these changes in separate packages. You still deploy owner-based sharing rules separately from organization-wide default changes.

Secure Guest Users' Org-Wide Defaults and Sharing Model Can't Be Disabled

The Secure guest user record access setting was enabled in all Salesforce orgs with communities or sites in Summer '20, but could still be disabled during that release. In Winter '21, this setting is enabled in all orgs and can no longer be disabled. The Secure guest user record access setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users.

Deploy Organization-Wide Defaults and Criteria-Based Sharing Rules Together

You can now simultaneously update the sharingModel field for an object and create new criteria-based or guest user sharing rules via the Metadata API. Previously, you deployed these changes in separate packages. You still deploy owner-based sharing rules separately from organization-wide default changes.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Metadata API Developer Guide: SharingRules

Metadata API Developer Guide: Deploying and Retrieving Metadata

Secure Guest Users' Org-Wide Defaults and Sharing Model Can't Be Disabled

The Secure guest user record access setting was enabled in all Salesforce orgs with communities or sites in Summer '20, but could still be disabled during that release. In Winter '21, this setting is enabled in all orgs and can no longer be disabled. The Secure guest user record access setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users.

Where: This change applies to orgs with active communities and sites in Essentials, Enterprise, Performance, Unlimited, and Developer editions

When: The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

SEE ALSO:

Salesforce Help: Secure Your Community or Portal (can be outdated or unavailable during release preview)

Summer '20 Release Note: Secure Guest Users' Org-Wide Defaults and Sharing Model (Previously Released Security Alert, Enforced)

Guest User: Guest User Security Policies Enforced

Fields: HTML in Labels Rendered as Plain Text and Management for Deleted Fields Available in Lightning Experience

HTML tags in custom field labels are rendered as plain text, and you can now manage deleted fields in Lightning Experience.

IN THIS SECTION:

Disable Rendering of HTML in Custom Field Labels (Update)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When enabled, HTML tags in custom field labels are rendered as plain text.

Manage Deleted Fields in Lightning Experience

You can now manage deleted fields in Lightning Experience. In previous releases, you could only manage a deleted field and its data by switching to Salesforce Classic.

Disable Rendering of HTML in Custom Field Labels (Update)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When enabled, HTML tags in custom field labels are rendered as plain text.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

When: Salesforce enforces this update in Spring '21.

Who: This update doesn't apply to all orgs. It's only visible in the release update list for customers that have HTML formatting in custom field labels and haven't been included in a previous auto-enablement.

How: For orgs that are affected by this update, we recommend that you enable this update in a sandbox before enabling it in your production org. Test that your custom field labels render correctly, and update any labels that rely on HTML formatting. After you rename a custom field, additional items sometimes require manual updates. Here's what you need to do to see if manual updates are required:

- Review list view names. List view names continue to display the original object name until you change them manually.
- Check standard report names and descriptions for the objects you renamed.
- Update the titles and descriptions of email templates that contain the original field name.
- Change items you customized with the new object or field name. For example, check custom fields that contain the original field name.

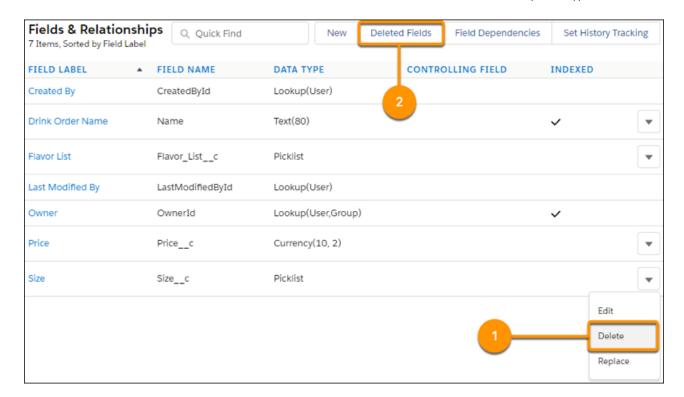
Manage Deleted Fields in Lightning Experience

You can now manage deleted fields in Lightning Experience. In previous releases, you could only manage a deleted field and its data by switching to Salesforce Classic.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: Deleted custom fields initially are soft deleted and their data is stored until they're permanently deleted, or after 15 days elapse.

Click **Delete** on a field name, then click **Deleted Fields** at the top of the Custom Fields & Relationships page to see a list of soft deleted fields. You can then choose to undelete or permanently delete the fields. If you choose to delete a field permanently, you are prompted to confirm.





Custom Metadata Types: Support for Geolocation Entities and Metadata Relationship Field Type User Interface Display

You can now create entity particle relationships for geolocation field types. Also, the dropdown menu for the metadata relationship field type shows which entities are supported.

IN THIS SECTION:

Custom Metadata Types Support Geolocation Field Types Relationships

Support for entity particle relationships was introduced in Summer '20, with the exception of geolocation field types. With Winter '21, you can now create geolocation field type relationships.

View Supported Relationship Entities When Creating Custom Metadata Types

When you a create metadata type, the metadata relationship field type menu now shows you which entities are supported. In previous releases, entities for relationships were only shown if they had a Salesforce Classic, Custom Fields setup page. This restriction was removed.

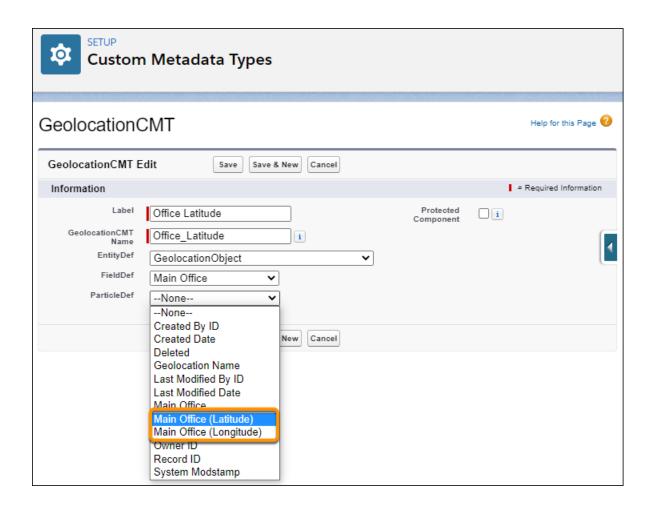
Custom Metadata Types Support Geolocation Field Types Relationships

Support for entity particle relationships was introduced in Summer '20, with the exception of geolocation field types. With Winter '21, you can now create geolocation field type relationships.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: The following example shows how to create a custom metadata relationship for a geolocation field type.

- 1. Create a custom object with a geolocation field.
- 2. Create a custom metadata type with the custom fields: entity definition, field definition, and entity particle.
- **3.** Create a record for the custom metadata type.
 - **a.** For the entity definition, select the custom object.
 - **b.** For the field definition, select the custom object geolocation field.
 - **c.** For the entity particle definition, select the geolocation field latitude or longitude.



SEE ALSO:

Custom Metadata Relationships
Salesforce Summer '20 Release Notes

View Supported Relationship Entities When Creating Custom Metadata Types

When you a create metadata type, the metadata relationship field type menu now shows you which entities are supported. In previous releases, entities for relationships were only shown if they had a Salesforce Classic, Custom Fields setup page. This restriction was removed.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: The following rules apply to the metadata relationship field type for both the user interface and Metadata API.

The entity:

- Must be publicly exposed
- Can be gueried using the API
- Supports Apex triggers
- Is customizable
- Supports layouts
- Is not part of a union, such as a task, activity, event, holiday
- Is not a setup entity, such as a permission set or a user

SEE ALSO:

Custom Metadata Relationships

General Setup: Utility Bar Alignment Customization, Dynamic Submit for Approval Action, and Record Type UI Changes

Customize where your org's utility bar appears on the screen. Display the Submit for Approval action only when a record is eligible for approval. Clearer description text and an updated profile column label for Step 1 of the New Record Type creation process.

IN THIS SECTION:

Choose Your Utility Bar Alignment

Customize where your Salesforce org's utility bar appears on the screen. You can choose to align the utility bar to the bottom right or the bottom left of the screen. The default alignment matches the directionality of the user's language.

Choose When to Show the Submit for Approval Action (Generally Available and Beta)

Ever wanted to display the Submit for Approval action only when a record is eligible for approval? That day has come! With dynamic actions, now you can set conditions for when each action is visible, including the Submit for Approval action.

Changes to Record Type Creation UI in Setup

To clarify what users can and can't do when they have access to a record type, we updated the description text and one of the profile column labels for Step 1 of the New Record Type creation process.

Require Permission to View Record Names in Lookup Fields (Previously Released Update)

To better protect your Salesforce org's data, we restricted who can view record names in lookup fields. Users must have Read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update was first made available in Spring '20.

Disable Standard Object Edits on Standard Profile (Update)

Salesforce reserves standard object permissions in standard profiles, so modifications are not allowed. This update enforces a validation to block modifications to standard profile object permissions to ensure org integrity.

Choose Your Utility Bar Alignment

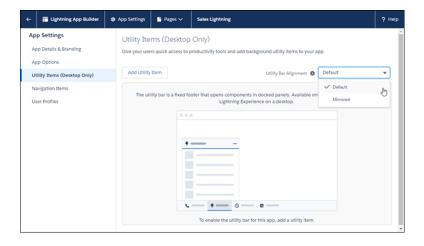
Customize where your Salesforce org's utility bar appears on the screen. You can choose to align the utility bar to the bottom right or the bottom left of the screen. The default alignment matches the directionality of the user's language.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Admins with the View Setup and Configuration and Customize Application can modify the utility bar alignment.

How: To change the utility bar alignment:

- 1. From Setup, in the Quick Find box, enter App, and then select App Manager.
- 2. Click **Edit** in the dropdown menu next to the app you want to change the alignment for.
- 3. In App Settings, select Utility Items (Desktop Only).
- 4. In **Utility Bar Alignment**, select the alignment you want.



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Note: The default alignment matches the user's language setting alignment. For example, English is read left to right. If you select **Default** and a user's language is set to English, the utility bar appears at the bottom of the left side of the screen. If you select **Mirrored**, the utility bar appears at the bottom of the right side of the screen.

SEE ALSO:

Salesforce Help Add a Utility Bar to Lightning Apps (can be outdated or unavailable during release preview)

Choose When to Show the Submit for Approval Action (Generally Available and Beta)

Ever wanted to display the Submit for Approval action only when a record is eligible for approval? That day has come! With dynamic actions, now you can set conditions for when each action is visible, including the Submit for Approval action.

Where: This change applies to Lightning Experience and the Salesforce mobile app in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Record-level dynamic actions for custom objects are generally available in Lightning Experience and available as a beta feature in the Salesforce mobile app. Record-level dynamic actions for supported standard objects (Account, Case, Contact, Lead, and Opportunity) are available as a beta feature in Lightning Experience. Page-level dynamic actions for custom objects are available as a beta feature in the Salesforce mobile app.



Note: As beta features, Dynamic Actions for selected standard objects on desktop and Dynamic Actions for custom objects in the Salesforce Mobile App are previews and aren't part of the "Services" under your master subscription agreement with Salesforce. Use either of these features at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of either of these features within any particular time frame or at all, and we can discontinue either feature at any time. These features are for evaluation purposes only, not for production use. These features are offered as is and aren't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with them. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Dynamic Actions in the Dynamic Forms & Actions group in the Trailblazer Community

SEE ALSO:

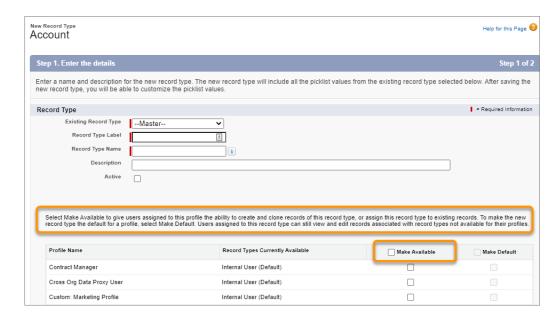
Unleash New Flexibility with Dynamic Actions on Desktop (GA and Beta) and Mobile (Beta)

Changes to Record Type Creation UI in Setup

To clarify what users can and can't do when they have access to a record type, we updated the description text and one of the profile column labels for Step 1 of the New Record Type creation process.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The Enable for Profile column header is now Make Available, and the description more clearly outlines what users with access to this record type can do.



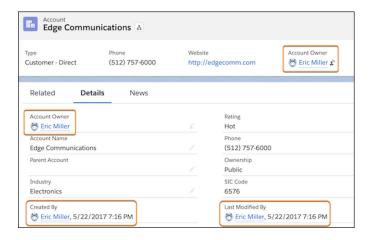
Require Permission to View Record Names in Lookup Fields (Previously Released Update)

To better protect your Salesforce org's data, we restricted who can view record names in lookup fields. Users must have Read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update was first made available in Spring '20.

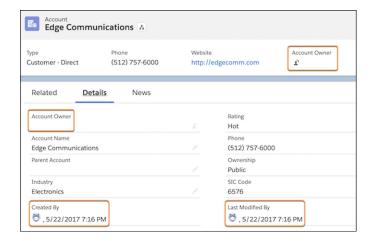
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

When: Salesforce enforces this update in Spring '21. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

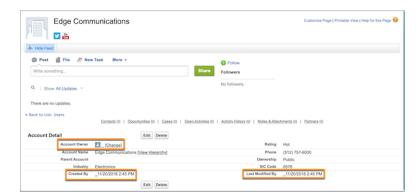
Why: Admins have more control over what users see in records. Currently, users can view record names in lookup fields without Read access to those records.



After this update is enforced, in Lightning Experience, users who don't have Read access or the View All Lookup Record Names permission see the lookup field labels, but not the data in the fields.



In Salesforce Classic, users who don't have Read access or the View All Lookup Record Names permission see an underscore in system user lookup fields. They also see the record ID in custom user lookup and non-user lookup fields.



How: Admins can enable the View All Lookup Record Name permission in custom profiles or permission sets. Only enable this permission for users who must see record names in all lookup and system fields, regardless of sharing settings. This permission only applies to lookup record names in list views and record detail pages.

We recommend that you test this update in a sandbox or Developer Edition org before enabling it in your production org.

To apply this update, from Setup, in the Quick Find box, enter Release Updates, then select **Release Updates**. For Require Permission to View Record Names in Lookup Fields, follow the testing and activation steps.

SEE ALSO:

Summer '20 Release Note: Require Permission to View Record Names in Lookup Fields (Update, Postponed) Release Updates

Disable Standard Object Edits on Standard Profile (Update)

Salesforce reserves standard object permissions in standard profiles, so modifications are not allowed. This update enforces a validation to block modifications to standard profile object permissions to ensure org integrity.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions for impacted orgs.

Security, Privacy, and Identity: Security Center and Mobile Device Tracking Generally Available, Required My Domain, and More Real-Time Monitoring Events and Field Encryption

When: Salesforce enforces this update in Summer '21. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Prior to this update, validation blocked modifications to standard object permissions on standard profiles in the UI but not the Metadata API. This update enforces validation for both the UI and Metadata API. This update enhances the Profile Metadata API to detect and prevent specific edits on standard profiles.

How: If your org is impacted by this change, you can view this update in Release Updates. From Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. We recommend that you test this update in a sandbox or Developer Edition org before enabling it in your production org.

SEE ALSO:

Release Updates

Security, Privacy, and Identity: Security Center and Mobile Device Tracking Generally Available, Required My Domain, and More Real-Time Monitoring Events and Field Encryption

Maintain security, privacy, and governance policies for multiple orgs with Security Center, now generally available. View and manage mobile device access to your org with Mobile Device Tracking, generally available. New Salesforce orgs get a My Domain by default and existing orgs must define one. Keep a closer eye on your org with three new Real-Time Monitoring Events. Encrypt fields associated with health intake documents, and encrypt some Financial Services Cloud documents.

IN THIS SECTION:

Authentication and Identity: Multi-Factor Authentication Assistant, Mobile Device Tracking, and SAML Updates

Changes in Salesforce Identity start with a Multi-Factor Authentication Assistant that helps you safeguard your Salesforce data. We also retired two-factor authentication terminology and moved to the industry standard term of multi-factor authentication. You can enhance your Salesforce org's security with Mobile Device Tracking. Web applications can now enable Cross-Origin Resource Sharing (CORS) to access resources from certain Salesforce OAuth endpoints. Secure outbound SAML messages when Salesforce is the identity provider.

Domains: Required My Domain, and Shorter URLs

New Salesforce orgs get a My Domain by default and existing orgs must define one by Winter '22. For customers with a My Domain, we're removing instance names from My Domain URLs through a release update.

Salesforce Shield: More Real-Time Monitoring Events, Legacy Transaction Security End of Life, and More Field Encryption

Real-Time Event Monitoring helps you identify and respond to anomalous API usage, monitor bulk API queries, and audit when users download data in Einstein Analytics. The Event Monitoring Analytics App helps you analyze exceptions without manually uploading datasets, and legacy Transaction Security framework is disabled. Shield Platform Encryption continues to offer another layer of security for more personally identifiable data. Encrypt Health Cloud data and fields on the Identity object.

Other Security Changes: Changes to Security Release Notes, Security Center General Availability, a Connectivity Change, and New Crypto Class Support

Identity for Customers and Partners and Data Protection and Privacy topics moved to a new home in the release notes: Customer 360 Truth. Monitor multiple orgs with Security Center (generally available). Review and update your TLS ciphers, and take advantage of more Crypto class values.

Authentication and Identity: Multi-Factor Authentication Assistant, Mobile Device Tracking, and SAML Updates

Changes in Salesforce Identity start with a Multi-Factor Authentication Assistant that helps you safeguard your Salesforce data. We also retired two-factor authentication terminology and moved to the industry standard term of multi-factor authentication. You can enhance your Salesforce org's security with Mobile Device Tracking. Web applications can now enable Cross-Origin Resource Sharing (CORS) to access resources from certain Salesforce OAuth endpoints. Secure outbound SAML messages when Salesforce is the identity provider.

IN THIS SECTION:

Implement MFA with the Multi-Factor Authentication Assistant

Multi-factor authentication (MFA) is one of the simplest, most effective ways to prevent unauthorized account access and safeguard your Salesforce data against security threats. We strongly recommend turning on MFA for all user interface logins. For help with planning and completing an MFA project, check out the new Multi-Factor Authentication Assistant.

We Upgraded to Using Multi-Factor Authentication Terminology

For all Salesforce products, we retired two-factor authentication terminology and moved to the industry standard term of multi-factor authentication. This update is a terminology change only—all functionality remains the same.

View and Revoke Devices with Mobile Device Tracking

For greater control over the security of your data, you can track and monitor which mobile devices are accessing your Salesforce org with Mobile Device Tracking. Using Apex or APIs, you can view information about a user's mobile device, set a device identifier like a serial number, and block access from a device. You can also build processes and policies to define how devices access your org. For example, require an approval request from the device before authorizing a login. In addition, create custom reports to see Device Management statistics, such as which devices are approved or revoked.

Maintain Permission Sets and Public Groups When Using Identity Connect

If you recently upgraded to Identity Connect 3.0.1.1, we strongly recommend that you upgrade to Identity Connect 3.0.1.2 because we no longer support the earlier version. Identity Connect 3.0.1.2 contains the same new features as Identity Connect 3.0.1.1, but with extra security measures. You can now maintain public group and permission set assignments in your Salesforce org when you are also using Identity Connect to manage users. Identity Connect 3.0.1.2 doesn't remove public group or permission set assignments from users who aren't managed with the add-on product. And you get enhanced security with an Identity Connect 3 Integration permission set requirement and a corrected Identity Connect setup error.

Perform Cross-Origin Requests to OAuth Endpoints

Web applications use Cross-Origin Resource Sharing (CORS) to request resources from origins other than their own. For example, a web application can use CORS to request information about a user from your My Domain or community. In addition to public and allowlisted web applications, Salesforce now supports CORs for certain OAuth endpoints when requested from a My Domain or community.

Secure SAML Messages When Salesforce Is the Identity Provider

When your Salesforce org acts as a SAML 2.0 identity provider, you can secure its messages to the service provider with either SHA1 or SHA256. These signing algorithms secure SAML messages by transforming them with hash functions. As the identity provider, Salesforce applies the selected algorithm to its SAML requests and responses. The selected signing algorithm is applied to single sign-on (SSO) and single logout (SLO) messages from your org to the service provider.

Update Identity Provider SAML Requests to Use Lowercase Sandbox Names

Sandbox names must be lowercase in recipient URLs within inbound SAML requests. If you set up your identity provider to send case-sensitive hostnames to Salesforce, update it to use lowercase sandbox names in SAML requests.

OAuth 2.0 User-Agent Flow Supports mobileauth.salesforce.com Redirect URL for Refresh Tokens

The OAuth 2.0 user-agent flow supports refresh tokens when the scope=refresh_token is included in the request and the redirect URL is https://mobileauth.salesforce.com/oauth/done.

Skip Identity Confirmation at Login Permission Was Clarified

The permission allows only a Salesforce Customer Support representative to skip identity confirmation at login. Previously, the permission description incorrectly implied that other users can skip identity confirmation at login.

Enable Read and Write Access on User Records for the Identity Connect Integration User

To give the Identity Connect integration user read and write access on user records, install the new Identity Connect managed package available for Identity Connect 3.0.1.2. This managed package provides read and write access to two new user field permissions, IC Group and IC Permission Set, as part of the Identity Connect 3 Integration Permission Set. The Identity Connect integration user requires this level of access to update user records.

Implement MFA with the Multi-Factor Authentication Assistant

Multi-factor authentication (MFA) is one of the simplest, most effective ways to prevent unauthorized account access and safeguard your Salesforce data against security threats. We strongly recommend turning on MFA for all user interface logins. For help with planning and completing an MFA project, check out the new Multi-Factor Authentication Assistant.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Drive Your Multi-Factor Authentication Implementation from One Place

We Upgraded to Using Multi-Factor Authentication Terminology

For all Salesforce products, we retired two-factor authentication terminology and moved to the industry standard term of multi-factor authentication. This update is a terminology change only—all functionality remains the same.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

SEE ALSO:

Renamed Two-Factor Authentication User Permissions and Labels in Setup Renamed Two-Factor Authentication User Permissions and Labels in Setup

View and Revoke Devices with Mobile Device Tracking

For greater control over the security of your data, you can track and monitor which mobile devices are accessing your Salesforce org with Mobile Device Tracking. Using Apex or APIs, you can view information about a user's mobile device, set a device identifier like a serial number, and block access from a device. You can also build processes and policies to define how devices access your org. For example, require an approval request from the device before authorizing a login. In addition, create custom reports to see Device Management statistics, such as which devices are approved or revoked.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions. Device Management was beta as of Spring '19. Mobile Device Tracking is generally available in Winter '21 and has significant differences from Device Management (beta). Mobile Device Tracking can be used with devices attempting to log in to your org using a mobile Salesforce app. Mobile Device Tracking doesn't work with logins through browsers.

Who: To view devices that access Salesforce, you must have the View Devices permission. To revoke device access, you must have the Manage Devices permission.

How: To enable Mobile Device Tracking for your org, contact Salesforce Customer Support.

SEE ALSO:

Salesforce Help: Mobile Device Tracking (can be outdated or unavailable during release preview)

Maintain Permission Sets and Public Groups When Using Identity Connect

If you recently upgraded to Identity Connect 3.0.1.1, we strongly recommend that you upgrade to Identity Connect 3.0.1.2 because we no longer support the earlier version. Identity Connect 3.0.1.2 contains the same new features as Identity Connect 3.0.1.1, but with extra security measures. You can now maintain public group and permission set assignments in your Salesforce org when you are also using Identity Connect to manage users. Identity Connect 3.0.1.2 doesn't remove public group or permission set assignments from users who aren't managed with the add-on product. And you get enhanced security with an Identity Connect 3 Integration permission set requirement and a corrected Identity Connect setup error.

Where: This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

How: After downloading Identity Connect 3.0.1.2, complete these steps:

- 1. Install the Identity Connect 3.0.1.2 managed package.
- 2. Assign the Identity Connect 3 Integration permission set to the appropriate connected app and user responsible for installing Identity Connect.

SEE ALSO:

Salesforce Help: Identity Connect

Release Notes and Implementation Guide: Identity Connect 3.0.1.2

Perform Cross-Origin Requests to OAuth Endpoints

Web applications use Cross-Origin Resource Sharing (CORS) to request resources from origins other than their own. For example, a web application can use CORS to request information about a user from your My Domain or community. In addition to public and allowlisted web applications, Salesforce now supports CORs for certain OAuth endpoints when requested from a My Domain or community.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer, Enterprise, Performance, and Unlimited editions.

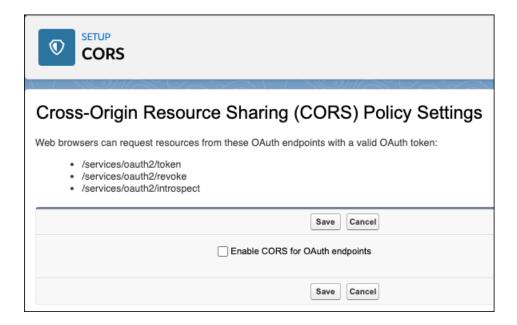
How: CORS is automatically enabled for these endpoints:

- /.well-known/openid-configuration
- /.well-known/auth-configuration
- /services/oauth2/id/keys

In addition, you can enable CORS for the /services/oauth2/userinfo endpoint by adding the origin URL of the web application serving the code to the CORS allowlist.

To enable CORS for these supported OAuth endpoints, select the Enable CORS for OAuth endpoints parameter from the CORS page. Salesforce only supports CORS for these OAuth endpoints when the web application posts its request to a My Domain or community URL.

- /services/oauth2/token
- /services/oauth2/revoke
- /services/oauth2/introspect





Warning: Some OAuth authorization flows contain a consumer secret. We strongly recommend that you protect the consumer secret from being exposed to end users.

SEE ALSO:

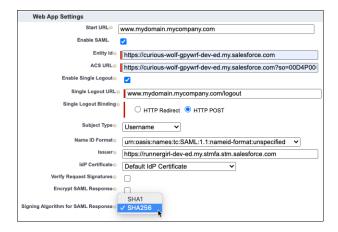
Salesforce Help: Enable CORS for OAuth Endpoints (can be outdated or unavailable during release preview)
Salesforce Help: OAuth Endpoints (can be outdated or unavailable during release preview)

Secure SAML Messages When Salesforce Is the Identity Provider

When your Salesforce org acts as a SAML 2.0 identity provider, you can secure its messages to the service provider with either SHA1 or SHA256. These signing algorithms secure SAML messages by transforming them with hash functions. As the identity provider, Salesforce applies the selected algorithm to its SAML requests and responses. The selected signing algorithm is applied to single sign-on (SSO) and single logout (SLO) messages from your org to the service provider.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions.

How: When you configure a connected app for your service provider, select the signing algorithm to apply to SAML requests and responses initiated by your org.



SEE ALSO:

Salesforce Help: Integrate Service Providers as Connected Apps with SAML 2.0 (can be outdated or unavailable during release preview)

Metadata API Developer Guide: Connected App (can be outdated or unavailable during release preview)

Update Identity Provider SAML Requests to Use Lowercase Sandbox Names

Sandbox names must be lowercase in recipient URLs within inbound SAML requests. If you set up your identity provider to send case-sensitive hostnames to Salesforce, update it to use lowercase sandbox names in SAML requests.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

When: This change affects sandboxes created or refreshed in Spring '20 or later.

How: To see the case of your sandbox name in your SAML configuration, from Setup, in the Quick Find box, enter <code>Single Sign-On Settings</code>, and then select **Single Sign-On Settings**. The Login URL field in the Endpoints section contains your Salesforce org's hostname.

SEE ALSO:

Salesforce Help: Configure SAML Settings for Single Sign-On (can be outdated or unavailable during release preview)

OAuth 2.0 User-Agent Flow Supports mobileauth.salesforce.com Redirect URL for Refresh Tokens

The OAuth 2.0 user-agent flow supports refresh tokens when the scope=refresh_token is included in the request and the redirect URL is https://mobileauth.salesforce.com/oauth/done.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

SEE ALSO

Salesforce Help: OAuth 2.0 User-Agent Flow for Desktop or Mobile App Integration (can be outdated or unavailable during release preview)

Skip Identity Confirmation at Login Permission Was Clarified

The permission allows only a Salesforce Customer Support representative to skip identity confirmation at login. Previously, the permission description incorrectly implied that other users can skip identity confirmation at login.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Enabling skip identity confirmation makes it easier for a Salesforce Customer Support rep to log into your account at your request to troubleshoot a problem.

Enable Read and Write Access on User Records for the Identity Connect Integration User

To give the Identity Connect integration user read and write access on user records, install the new Identity Connect managed package available for Identity Connect 3.0.1.2. This managed package provides read and write access to two new user field permissions, IC Group and IC Permission Set, as part of the Identity Connect 3 Integration Permission Set. The Identity Connect integration user requires this level of access to update user records.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

Domains: Required My Domain, and Shorter URLs

New Salesforce orgs get a My Domain by default and existing orgs must define one by Winter '22. For customers with a My Domain, we're removing instance names from My Domain URLs through a release update.

IN THIS SECTION:

Deploy a My Domain (Update)

To use the latest features and comply with browser requirements, all Salesforce orgs must have a My Domain. Deploy one, or we assign one for you based on your company name. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced in Winter '22.

Define a My Domain When Creating a New Salesforce Org

All production Salesforce orgs created in Winter '21 or later get a My Domain by default. With My Domain, you get a subdomain within the salesforce.com domain. For example, https://examplecompany.my.salesforce.com. A My Domain is required to comply with browser requirements and use the latest Salesforce features.

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Removing the instance name makes domains shorter and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update is postponed to Summer '22.

Setting That Allows Non-Secure HTTP Connections for Sites Was Removed

As part of updates related to Google Chrome's SameSite cookie changes, HTTPS connections are required to access Salesforce. The Require Secure HTTPS Connections release update was enforced in production orgs on May 1, 2020. In Winter '21, we removed the Sites setting, Require Non-Secure Connections (HTTP), because HTTP connections are no longer permitted for authenticated requests.

Deploy a My Domain (Update)

To use the latest features and comply with browser requirements, all Salesforce orgs must have a My Domain. Deploy one, or we assign one for you based on your company name. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced in Winter '22.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Winter '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Who: This update applies to orgs without a deployed My Domain at the start of Winter '21.

Why: Deploying a My Domain brands your login URL with your chosen My Domain name. It also removes the instance name from your login URL, preventing user login disruption if your org moves to another Salesforce instance. You must have a My Domain to set a custom login policy that determines how users are authenticated. A My Domain is also required to set up single sign-on (SSO) with external vendors and to use newer services like Customer 360. Some Lightning container components and web security protections require a My Domain as well.

How: We recommend that you deploy a My Domain in a sandbox and test connectivity across your org before deploying in production.

To complete this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Deploy a My Domain, follow the testing and activation steps. See My Domain in Salesforce Help for details on how to set up, test, and deploy a My Domain.

If you don't deploy a My Domain before the enforcement date, Salesforce sets one for you based on your org's company name. If you prefer to use a different name, you can change your My Domain after we set it.

SEE ALSO:

Salesforce Help: My Domain (can be outdated or unavailable during release preview)

Salesforce Help: My Domain URL Formats (can be outdated or unavailable during release preview)

Release Updates

Define a My Domain When Creating a New Salesforce Org

All production Salesforce orgs created in Winter '21 or later get a My Domain by default. With My Domain, you get a subdomain within the salesforce.com domain. For example, https://examplecompany.my.salesforce.com. A My Domain is required to comply with browser requirements and use the latest Salesforce features.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Specify your new org's My Domain name during sign-up using the My Domain field. If the requested My Domain name isn't unique, the sign-up process adds characters at the end of the name. For example, if you request "example" as your My Domain name and it's in use, the sign-up process can adjust it to "example1" or "example-1a".

If you don't choose a My Domain during sign-up, Salesforce assigns one for you based on your company name. If you don't like the one we set, you can change it.

If you maintain a sign-up form for Salesforce orgs, we recommend that you add the My Domain name field.

To change your My Domain name, in Setup, in the Quick Find box, enter My Domain, and then select **My Domain**. Under My Domain Settings, select **Edit**, and then enter a new My Domain name in the Rename your My Domain field. Select **Check for availability**, and

if the domain is available, click **Save** to submit your new My Domain for provisioning. After provisioning is complete, deploy your new domain for your changes to take effect.

SEE ALSO:

Salesforce Help: My Domain (can be outdated or unavailable during release preview)

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Removing the instance name makes domains shorter and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update is postponed to Summer '22.

Where: This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: This update is enabled automatically in sandbox orgs when they are created or refreshed. Salesforce enforces this update in all orgs in Summer '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When we remove the instance name from your URLs, your hostnames change. For example:

- MyDomainName--PackageName.visualforce.com replaces
 MyDomainName--PackageName.InstanceName.visual.force.com
- MyDomainName--c.documentforce.com replaces MyDomainName--c.InstanceName.content.force.com
- MyDomainName.builder.salesforce-communities.com replaces
 MyDomainName--sitestudio.InstanceName.force.com

All *.content.force.com URLs are replaced with *.documentforce.com.

How: We recommend that you test this update in a sandbox. Ensure that the new URLs work with firewalls and proxy servers in the network path between your users and Salesforce. Firewalls and proxy servers that filter by hostname must also trust the following:

- *.visualforce.com
- *.documentforce.com
- *.salesforce-communities.com
- (1) Important: Before you enable this update, review these considerations.
 - If your users access Salesforce using iOS or Apple® Safari®, we don't recommend enabling this update due to compatibility issues.
 - This update can log out users who are accessing Visualforce, Experience Builder, Site.com Studio, and content file URLs. To minimize disruption, consider applying this update during off-peak hours.

To enable this update, from Setup, in the Quick Find Box, enter Release Updates, and then select **Release Updates**. For Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files, follow the testing and activation steps.

SEE ALSO:

Spring '18 Release Notes: Remove Instance Names from URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Critical Update)

Salesforce Help: Supported Browsers (can be outdated or unavailable during release preview)

Release Updates

Setting That Allows Non-Secure HTTP Connections for Sites Was Removed

As part of updates related to Google Chrome's SameSite cookie changes, HTTPS connections are required to access Salesforce. The Require Secure HTTPS Connections release update was enforced in production orgs on May 1, 2020. In Winter '21, we removed the Sites setting, Require Non-Secure Connections (HTTP), because HTTP connections are no longer permitted for authenticated requests.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions.

SEE ALSO:

Summer '20 Release Notes: Require Secure HTTPS Connections (Update, Enforced)

Salesforce Shield: More Real-Time Monitoring Events, Legacy Transaction Security End of Life, and More Field Encryption

Real-Time Event Monitoring helps you identify and respond to anomalous API usage, monitor bulk API queries, and audit when users download data in Einstein Analytics. The Event Monitoring Analytics App helps you analyze exceptions without manually uploading datasets, and legacy Transaction Security framework is disabled. Shield Platform Encryption continues to offer another layer of security for more personally identifiable data. Encrypt Health Cloud data and fields on the Identity object.

IN THIS SECTION:

Shield Platform Encryption: Encrypt Data Associated with Documents and Deprecated Release Update

Shield Platform Encryption continues to give you more ways to protect personally identifiable information. You can now encrypt fields associated with health intake documents. You can also encrypt the documents you use to identify clients in Financial Services Cloud. And the release update removing the Manage Encryption Keys permission from the System Administrator profile is deprecated.

Event Monitoring: Transaction Security Retirement, New Events

The Legacy Transaction Security framework was retired. Real-Time Event Monitoring now includes two new events to help you keep an even closer eye on what's going on in your Salesforce org. Use the new API Anomaly Event to track anomalies in how users make API calls on your org's data. Implement transaction security policies with BulkApiResultEvent to query large amounts of data to access later.

Shield Platform Encryption: Encrypt Data Associated with Documents and Deprecated Release Update

Shield Platform Encryption continues to give you more ways to protect personally identifiable information. You can now encrypt fields associated with health intake documents. You can also encrypt the documents you use to identify clients in Financial Services Cloud. And the release update removing the Manage Encryption Keys permission from the System Administrator profile is deprecated.

IN THIS SECTION:

Encrypt Data Associated with Health Intake Documents

When you upload documents that are part of the home health care intake process, you can now encrypt personally identifiable information related to those documents. You can encrypt the Mapped Fields and Extracted Values fields on the OCR Document Scan Result object.

Encrypt Identity Document Fields

You can now encrypt fields on the documents you use to identify Financial Services Cloud clients. When you encrypt the Issue Date, Expiration Date, and Document Number fields, you add another layer of protection to the data your clients entrust to your care.

Encrypt Salesforce CPQ Data

Use Shield Platform Encryption to comply with regulations on storing your sensitive Salesforce CPQ information. With Shield Platform Encryption, you can add another layer of protection to data at rest while preserving critical business functionality.

Manage Encryption Keys Permission Removal from System Administrator Profile Release Update Deprecated (Previously Released Update)

The Manage Encryption Keys Permission Removed from System Administrator Profile release update is deprecated and no longer available in Setup. Your existing permission settings do not change. However, as a best practice, customers who enabled Shield Platform Encryption before the Spring '16 release should assign the Manage Encryption Keys permission to individuals, and not rely on the System Administrator profile.

Encrypt Data Associated with Health Intake Documents

When you upload documents that are part of the home health care intake process, you can now encrypt personally identifiable information related to those documents. You can encrypt the Mapped Fields and Extracted Values fields on the OCR Document Scan Result object.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Salesforce admins with the Health Cloud Platform permission set license can apply Shield Platform Encryption to Health Cloud fields.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply either the probabilistic or deterministic encryption scheme to most fields.

SEE ALSO:

Protect Your Health Data with Salesforce Shield

Encrypt Identity Document Fields

You can now encrypt fields on the documents you use to identify Financial Services Cloud clients. When you encrypt the Issue Date, Expiration Date, and Document Number fields, you add another layer of protection to the data your clients entrust to your care.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change applies to editions that have both Financial Services Cloud and Shield Platform Encryption enabled.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply the deterministic encryption scheme to the Document Number field.

Encrypt Salesforce CPQ Data

Use Shield Platform Encryption to comply with regulations on storing your sensitive Salesforce CPQ information. With Shield Platform Encryption, you can add another layer of protection to data at rest while preserving critical business functionality.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change is available to customers who purchased Salesforce Shield and Shield Platform Encryption add-on subscriptions.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply either the probabilistic or deterministic encryption scheme to most fields.

Manage Encryption Keys Permission Removal from System Administrator Profile Release Update Deprecated (Previously Released Update)

The Manage Encryption Keys Permission Removed from System Administrator Profile release update is deprecated and no longer available in Setup. Your existing permission settings do not change. However, as a best practice, customers who enabled Shield Platform Encryption before the Spring '16 release should assign the Manage Encryption Keys permission to individuals, and not rely on the System Administrator profile.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Event Monitoring: Transaction Security Retirement, New Events

The Legacy Transaction Security framework was retired. Real-Time Event Monitoring now includes two new events to help you keep an even closer eye on what's going on in your Salesforce org. Use the new API Anomaly Event to track anomalies in how users make API calls on your org's data. Implement transaction security policies with BulkApiResultEvent to guery large amounts of data to access later.

IN THIS SECTION:

Legacy Transaction Security: End of Life

With the enhanced transaction security policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, all policies written with the legacy framework are disabled. Make sure to migrate your legacy transaction security policies to the new framework. This update was first made available in Winter '20.

Prevent Data Loss with BulkApiResult Event

Preventing data leakage is a key capability of Event Monitoring. Malicious users can perform bulk operations on Salesforce entities to export sensitive org data, so we created a new real-time event that can help you monitor Bulk API activity. Use the new BulkApiResultEvent streaming object and BulkApiResultEventStore storage object to monitor when Bulk API results are downloaded via a REST endpoint or the Bulk API Job page in Setup. BulkApiResultEventStore supports Transaction Security.

Detect Anomalies in API Queries with New ApiAnomalyEvent

Track security threats to your Salesforce org with a brand new Real-Time Event Monitoring event. With ApiAnomalyEvent, you can track anomalies in how users make API calls to your org's data. The associated storage object ApiAnomalyEventStore supports transaction security policies.

Analyze Unexpected Exceptions in the Event Monitoring Analytics App

The Event Monitoring Analytics App just got more user-friendly with the addition of an EventLogFile event type. With the Apex UnexpectedException Event Dataset, you can analyze exceptions in the Analytics app without uploading the dataset manually or via the External Data API.

View Einstein Analytics Data Downloads in Your Event Log Files

Enhance tracking and security of downloaded data from Einstein Analytics with the new Wave Download Event. Download logs are now exposed in Event Monitoring to enable reporting on asset type, ID, dataset ID, Salesforce user type, download format, and number of rows downloaded.

Correlate Threat Data Easier with Restructured JSON Format

The restructured JSON content of SecurityEventData field for the SessionHijackingEvent and SessionHijackingEventStore objects now matches the structure of other threat events. Using the same JSON structure makes it easier to view and correlate threat events in the org.

Legacy Transaction Security: End of Life

With the enhanced transaction security policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, all policies written with the legacy framework are disabled. Make sure to migrate your legacy transaction security policies to the new framework. This update was first made available in Winter '20.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

How: To determine if your security policies are using the legacy framework, check their associated Apex classes. Legacy policies implement the TxnSecurity. Policy Condition interface. Although a legacy policy can't run in the new framework, it's still visible, so you can examine its logic to reproduce it in the new policy. If you like using a point-and-click tool, Condition Builder provides most of the functionality to create a policy in the new framework. To migrate a legacy policy, create one in the new enhanced framework that mimics the old behavior. If you prefer to code or require more functionality than Condition Builder provides, implement the Apex class with the new TxnSecurity. Event Condition interface.

We welcome feedback about the migration and any issues that you encounter so that we can improve the transition for all Event Monitoring customers. You can provide feedback and suggestions for this feature in the Salesforce Official: Shield group in the Trailblazer Community.

SEE ALSO:

Knowledge Article:Legacy Transaction Security Retirement
Salesforce Help:Migrate Legacy Policies to the Enhanced Transaction Security Framework
Salesforce Release Updates

Prevent Data Loss with BulkApiResult Event

Preventing data leakage is a key capability of Event Monitoring. Malicious users can perform bulk operations on Salesforce entities to export sensitive org data, so we created a new real-time event that can help you monitor Bulk API activity. Use the new BulkApiResultEvent streaming object and BulkApiResultEventStore storage object to monitor when Bulk API results are downloaded via a REST endpoint or the Bulk API Job page in Setup. BulkApiResultEventStore supports Transaction Security.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

Salesforce Help:BulkApiResultEventStore Policies (can be outdated or unavailable during release preview)

Detect Anomalies in API Queries with New ApiAnomalyEvent

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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

Salesforce Help: ApiAnomaly Event Store Policies (can be outdated or unavailable during release preview)

Analyze Unexpected Exceptions in the Event Monitoring Analytics App

The Event Monitoring Analytics App just got more user-friendly with the addition of an EventLogFile event type. With the Apex UnexpectedException Event Dataset, you can analyze exceptions in the Analytics app without uploading the dataset manually or via the External Data API.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

How:Upgrade your Event Monitoring Analytics App to take advantage of this new dataset.

SEE ALSO:

Salesforce Object Reference Guide: Apex Unexpected Exception Event Type

View Einstein Analytics Data Downloads in Your Event Log Files

Enhance tracking and security of downloaded data from Einstein Analytics with the new Wave Download Event. Download logs are now exposed in Event Monitoring to enable reporting on asset type, ID, dataset ID, Salesforce user type, download format, and number of rows downloaded.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

How: If you're an Event Monitoring customer, you automatically get the WAVE_DOWNLOAD_EVENT fields in event log data when your users work in Analytics. You can use the data to create datasets and dashboards.

SEE ALSO:

Salesforce Object Reference Guide: Wave Download Event Type (can be outdated or unavailable during release preview)

Correlate Threat Data Easier with Restructured JSON Format

The restructured JSON content of SecurityEventData field for the SessionHijackingEvent and SessionHijackingEventStore objects now matches the structure of other threat events. Using the same JSON structure makes it easier to view and correlate threat events in the org.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

Platform Events Developer Guide: SessionHijackingEventStore Platform Events Developer Guide: SessionHijackingEvent Salesforce Help:Investigate Session Hijacking

Other Security Changes: Changes to Security Release Notes, Security Center General Availability, a Connectivity Change, and New Crypto Class Support

Identity for Customers and Partners and Data Protection and Privacy topics moved to a new home in the release notes: Customer 360 Truth. Monitor multiple orgs with Security Center (generally available). Review and update your TLS ciphers, and take advantage of more Crypto class values.

IN THIS SECTION:

Changes to the Security, Privacy, and Identity Release Notes Section

Identity for Customers and Partners and Data Protection and Privacy release notes moved to a new home in the release notes—Customer 360 Truth. They join other Customer 360 release notes to give you the information you need to successfully manage your customer data, identity, and privacy.

Streamline Security Policy Monitoring with Security Center (Generally Available)

No matter how many Salesforce orgs you're responsible for, Security Center lets you maintain security, privacy, and governance policies for all of them. This feature, now generally available, includes some changes since the last release. Formerly named Security Command Center, this release adds metrics for frozen users, connected apps, and 12 new permission metrics. The app also has self-service set up and an improved dashboard design to help you skip the scrolling and quickly dig into your data.

Review and Update Your TLS 1.2 Ciphers

We updated the Salesforce Services supported TLS 1.2 cipher suites. We removed support for two TLS 1.2 cipher suites for HTTPS callouts from the Sales, Service, and Communities Clouds. If you use the TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA or TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA cipher suite, update your server to use one of the supported suites.

Apex Crypto Class Supports ECDSA

Apex Crypto class updates help you reduce your security footprint and take advantage of more signature options. We offer support for ECDSA-SHA256, ECDSA-SHA384, and ECDSA-SHA512 values in the algorithmName parameter in Crypto.sign, Crypto.signWithCertificate, Crypto.signXML(), and Crypto.verify() (methods) in the System.Crypto class.

Changes to the Security, Privacy, and Identity Release Notes Section

Identity for Customers and Partners and Data Protection and Privacy release notes moved to a new home in the release notes—Customer 360 Truth. They join other Customer 360 release notes to give you the information you need to successfully manage your customer data, identity, and privacy.

SEE ALSO:

Customer 360 Truth: A Secure, Single Source of Truth for All of Your Customer Data

Streamline Security Policy Monitoring with Security Center (Generally Available)

No matter how many Salesforce orgs you're responsible for, Security Center lets you maintain security, privacy, and governance policies for all of them. This feature, now generally available, includes some changes since the last release. Formerly named Security Command Center, this release adds metrics for frozen users, connected apps, and 12 new permission metrics. The app also has self-service set up and an improved dashboard design to help you skip the scrolling and quickly dig into your data.

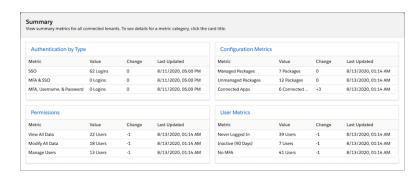
Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: Security Center is available as an add-on subscription. To view the dashboard and metric pages, assign the View Security Center Pages permission. To manage connected tenants, assign the Manage Security Center permission.

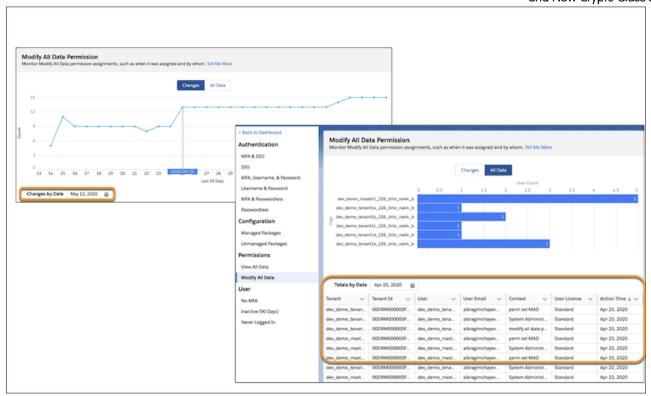
Why: With Security Center, you can limit risks and shorten security review processes. Use the app to gain clear insights into how you're meeting your security goals so that you can respond proactively to suspicious conditions. And during periods of growth or change, Security Center can help you monitor changes that touch sensitive customer data.

How: To set up an app, choose which tenant you want to view the Security Center app in. Log in to that tenant, and select **Security Center** from the App Launcher. On the Connected Tenants page, connect tenants to the app. You can disconnect tenants at any time and establish multiple apps to compartmentalize distinct clusters of data.

The new compact dashboard design gives you an easy-to-read overview of your metrics. See aggregate values for each metric, how much each value has changed since the last update, and when that update happened. Click a category to see weekly data for each metric in that category.



Need even more detail? Click a card to open a detail page, and choose how you want to see details. See day-over-day changes or all data broken down by tenant. The lower half of the screen lists details that give you critical context for settings, actions, and events of interest.



SEE ALSO:

Salesforce Help: Take Charge of Your Security Goals with Security Center (can be outdated or unavailable during release preview)

Review and Update Your TLS 1.2 Ciphers

We updated the Salesforce Services supported TLS 1.2 cipher suites. We removed support for two TLS 1.2 cipher suites for HTTPS callouts from the Sales, Service, and Communities Clouds. If you use the TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA or TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA cipher suite, update your server to use one of the supported suites.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

SEE ALSO:

Knowledge Article: Salesforce Services and Marketing Cloud supported TLS 1.2 Cipher Suites

Apex Crypto Class Supports ECDSA

Apex Crypto class updates help you reduce your security footprint and take advantage of more signature options. We offer support for ECDSA-SHA256, ECDSA-SHA384, and ECDSA-SHA512 values in the algorithmName parameter in Crypto.sign, Crypto.signWithCertificate, Crypto.signXML(), and Crypto.verify() (methods) in the System.Crypto class.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: For information about generating and using key material, see the Crypto Class entry in the Apex Developer Guide.

Customer 360 Truth: A Secure, Single Source of Truth for All of Your Customer Data

Learn what's new with Customer 360 Truth. Give your users more identity verification options and data unification to enable personalized interactions. And use one app to create policies to monitor multiple Salesforce orgs.

IN THIS SECTION:

Customer 360 Audiences: Realtime Customer Data Management That Drives Engagement

Customer 360 Audiences is a customer data management, segmentation, and activation tool that drives personalization and engagement. Using a series of solutions, you can achieve a single, actionable view of your customer built on the world's #1 customer platform.

Customer 360 Data Manager: Connect Data Sources to Create a Single View of Your Customer

Connect all of your customer data across your business—including multiple Salesforce orgs, Commerce Cloud B2C instances, and even data sources outside Salesforce. Create global profiles, map objects and fields across data sources using the Cloud Information Model, and use Lightning web components to create integrated experiences.

Identity for Customers & Partners: Identity Verification by SMS, Email Address Change Verification (Update), and Customizable Email Templates

Let your users verify their identity for multi-factor authentication by text message. When a community member changes their email address, they must verify the change through emails that are sent to the new and old addresses. And you can customize the email notifications that you send them.

Privacy & Data Compliance: Privacy Center and Consent Event Stream

Use the Salesforce Privacy Center to satisfy customer requests and data privacy laws, like the General Data Protection Regulation (GDPR), with two customizable features. Effortlessly monitor changes to consent and contact information on all core objects with Consent Event Stream.

Customer 360 Audiences: Realtime Customer Data Management That Drives Engagement

Customer 360 Audiences is a customer data management, segmentation, and activation tool that drives personalization and engagement. Using a series of solutions, you can achieve a single, actionable view of your customer built on the world's #1 customer platform.

Check out the latest features and updates from Customer 360 Data Audiences: Customer 360 Audiences Release Notes.

Customer 360 Data Manager: Connect Data Sources to Create a Single View of Your Customer

Connect all of your customer data across your business—including multiple Salesforce orgs, Commerce Cloud B2C instances, and even data sources outside Salesforce. Create global profiles, map objects and fields across data sources using the Cloud Information Model, and use Lightning web components to create integrated experiences.

Check out the latest features and updates from Customer 360 Data Manager: Customer 360 Data Manager Release Notes.

SEE ALSO:

Salesforce Help: Customer 360 Data Manager Basics
Trailhead: Get Started with Customer 360 Data Manager

Identity for Customers & Partners: Identity Verification by SMS, Email Address Change Verification (Update), and Customizable Email Templates

Let your users verify their identity for multi-factor authentication by text message. When a community member changes their email address, they must verify the change through emails that are sent to the new and old addresses. And you can customize the email notifications that you send them.

IN THIS SECTION:

Let Your Community Users, Customers, and Partners Verify Their Identities with SMS

Rolling out multi-factor authentication to your users can be a complex process. Make it a snap with multi-factor authentication by SMS. Logging in securely is as easy as getting a text message.

Require Verification When Community Users, Partners, and Customers Change Their Email Address (Update)

This security update requires external users to confirm their community email address changes.

Put Your Own Spin on Your Community's Email Address Change Verification Emails

When a Lightning community member changes their email address, they're sent two security emails—one to their old email address and one to their new one. Customize the emails that they receive by using the New and Old Email Address Change Verification templates.

Let Your Community Users, Customers, and Partners Verify Their Identities with SMS

Rolling out multi-factor authentication to your users can be a complex process. Make it a snap with multi-factor authentication by SMS. Logging in securely is as easy as getting a text message.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Who: Customers who have an Identity Verification Credit Add-On license can use multi-factor authentication by SMS.

How: Contact Salesforce Customer Support to enable SMS multi-factor authentication. Then, enable Let external users verify their identity by text (SMS) on profiles and permission sets. If this setting is enabled and a user must complete a multi-factor authentication challenge, but they don't have any enrolled verifiers, they are asked to verify their mobile phone number.



Note: SMS is not as secure as other multi-factor authentication methods. Use discretion when enabling this permission.

SEE ALSO:

Salesforce Help: Salesforce Identity Licenses (can be outdated or unavailable during release preview)

Require Verification When Community Users, Partners, and Customers Change Their Email Address (Update)

This security update requires external users to confirm their community email address changes.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

When: Salesforce enforces this update in Spring '21. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Who: This release update is for all Salesforce Lightning communities.

Why: This update automatically enables the Require email confirmations for email address changes setting in all orgs. Customers can opt out by disabling this setting.

How: When a user changes an email address, an email is sent to the new address for confirmation. After the user clicks the confirmation link in the message, the address change takes effect.

SEE ALSO:

Release Updates

Put Your Own Spin on Your Community's Email Address Change Verification Emails

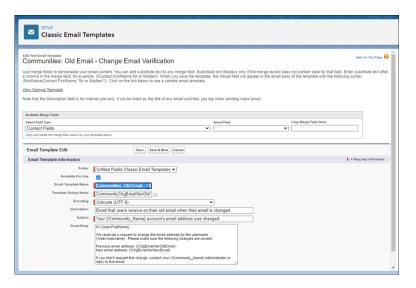
When a Lightning community member changes their email address, they're sent two security emails—one to their old email address and one to their new one. Customize the emails that they receive by using the New and Old Email Address Change Verification templates.

Where: This change applies Lightning communities accessed through Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: To customize the emails that users receive when they change their email address, use the new templates in your community workspace. From Setup, in the Quick Find box, enter <code>Classic Email Templates</code>, and then select **Classic Email Templates**. Select either the Communities: New Email - Change Email Verification or the Communities: Old Email - Change Email Verification template.



Example:



SEE ALSO:

Salesforce Help: Email Address Change Template (can be outdated or unavailable during release preview)

Privacy & Data Compliance: Privacy Center and Consent Event Stream

Use the Salesforce Privacy Center to satisfy customer requests and data privacy laws, like the General Data Protection Regulation (GDPR), with two customizable features. Effortlessly monitor changes to consent and contact information on all core objects with Consent Event Stream.

IN THIS SECTION:

Securely Manage Customer Data with Salesforce Customer 360 Privacy Center

Use one app to easily create policies that manage how your Salesforce org retains, deletes, anonymizes, and sends copies of customer data. Salesforce Customer 360 Privacy Center helps you satisfy customer requests and data privacy laws, like the General Data Protection Regulation (GDPR), with customizable features.

Monitor Changes to Consent with Consent Event Stream

Receive notifications about changes to consent or contact information on all core objects in a single stream. Events captured in the Consent Event Stream are visible for 24 hours.

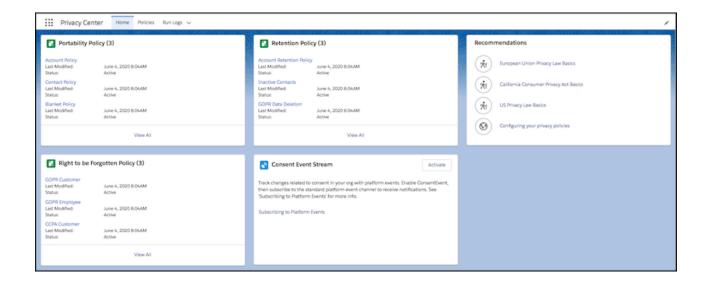
Securely Manage Customer Data with Salesforce Customer 360 Privacy Center

Use one app to easily create policies that manage how your Salesforce org retains, deletes, anonymizes, and sends copies of customer data. Salesforce Customer 360 Privacy Center helps you satisfy customer requests and data privacy laws, like the General Data Protection Regulation (GDPR), with customizable features.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Manage how long your org keeps customers' personally identifiable information (PII) using data retention policies. Create right to be forgotten policies that automate how data is made anonymous or deleted from your org. To meet customer data rights, make policies with the Data Subject Access Request feature that identifies and compiles customer PII data. Then securely send a copy of all PII data from your org to your customer with the Portability API.

How: Customer 360 Privacy Center is available as an add-on subscription. Contact Salesforce to enable it, then open Customer 360 Privacy Center from the App Launcher.



Monitor Changes to Consent with Consent Event Stream

Receive notifications about changes to consent or contact information on all core objects in a single stream. Events captured in the Consent Event Stream are visible for 24 hours.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: To use this feature, you need the ReadAllData or PrivacyDataAccess permission.

How: Enable the Consent Event Stream feature for your org, then subscribe to the Consent Event channel to receive notifications about changes to objects. From Setup, in the Quick Find Box, enter <code>Data Privacy Platform</code>, and then select **Consent Event Stream**. Check the box next to Use the Consent Event Stream. The Consent Event Stream sends notifications to the channel /event/ConsentEvent.

SEE ALSO:

Developer Guide: Subscribing to Platform Events (can be outdated or unavailable during release preview)

Developer Guide: Change Event Object Support (can be outdated or unavailable during release preview)

Deployment: New Change Set Components

Send customizations from one org to another by adding these components to change sets.

IN THIS SECTION:

New Change Set Components

The components available for change sets vary by edition. These components are now available for change sets.

New Change Set Components

The components available for change sets vary by edition. These components are now available for change sets.

Allow URL for Redirects

Represents a trusted URL outside of the Salesforce domain to which links can redirect users without showing a "leaving Salesforce" warning message.

Channel Menu Deployment

Represents the deployment of a channel menu (such as phone or web chat) to a Salesforce Community or Site.

Custom Index

Represents a custom index used to improve the performance of SOQL gueries.

Development: Create Your Own Salesforce App

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

IN THIS SECTION:

Lightning Components: Custom Buttons for the lightning-input-rich-text Base Component, Second-Generation Packages Support Lightning Message Channels

Add custom buttons to the input rich-text base component (beta). Second-generation packages now support Lightning message channels.

Einstein Vision and Language: Image Recognition and Natural Language Processing

Not a data scientist or machine-learning expert but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

Visualforce: Lightning Message Channels in Second-Generation Packages and Shortened URLs

You can now include message channels in second-generation packages. The release update that removes instance names from some URLs is activated in Summer '21.

Apex

Avoid null pointer exceptions by using the safe navigation operator (?.). Make partial or full updates to a resource in an HTTP web service by specifying the PATCH method in the HttpRequest class. Create, configure, and send custom notifications directly from Apex code using the Messaging.CustomNotification class. Detect Apex runtime context using Requestld and Quiddity values. Improve Apex testing with the new SObject error methods. The Database.deleteImmediate() method now supports batch deletes of up to 50,000 big object records at once. The @namespaceAccessible annotation provides enhanced support for accessing Apex in second-generation packages.

API

In API version 50.0, use the new /composite/graph resource.

Packaging: Package Ancestry Visualizations, Unwanted Package Versions Are Deletable, Push Upgrades Are Generally Available

Use Salesforce CLI to visualize your package ancestry tree. Delete unwanted and unreleased unlocked or second-generation managed package versions. Specify a user to receive email notifications for package errors. Push upgrades are generally available for unlocked and second-generation managed packages.

Scratch Orgs: Org Shape and New Features

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy. The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

Lightning Design System: Styling Hooks and Other Component Blueprint Enhancements

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with the Salesforce Lightning principles, design language, and best practices. In this release, we implemented styling hooks so you can customize component styles for your branding.

AppExchange Partners: Listing Activity Summary by Region in Marketplace Analytics and Simulation Mode in AppExchange App Analytics

See which locations drive activity using Marketplace Analytics Activity Summary by Region. Test your custom integrations with App Analytics simulation mode.

Change Data Capture: Event Enrichment (Beta) and More Object Support

Enrich your event messages with fields and receive change notifications for more objects.

Platform Events: Subscription Management and Usage Monitoring

Manage your Apex trigger subscriptions from the user interface, monitor usage metrics, and track the status of event publishing (beta).

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components: Custom Buttons for the lightning-input-rich-text Base Component, Second-Generation Packages Support Lightning Message Channels

Add custom buttons to the input rich-text base component (beta). Second-generation packages now support Lightning message channels



Note: Looking for new and changed Lightning web components, Aura components, and Aura component interfaces? We consolidated the lists of new and changed items at the end of the Development section.

IN THIS SECTION:

Add Custom Buttons to the lightning-input-rich-text Base Component (Beta)

You can add buttons to perform actions that you define, such as inserting an email template, applying formats, or adding a link to your FAQ. You can even open a popup from a custom button. Define a custom button using two new components together, nested in the lightning-input-rich-text component.

Second-Generation Packages Support Lightning Message Channels

Lightning components use message channels to communicate via the Lightning Message Service. You can now include message channels in second-generation packages.

Scan a Barcode in a Lightning Web Component (Beta)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way!

Increased Timeout for Client-Side Caching

When a component is generated on the server from metadata, the page loads from a client-side cache of the indexed database. The client-side cache timeout has increased from 15 minutes to 8 hours, with a refresh interval of 15 minutes. This increased timeout can result in faster page loads for users who bootstrap the application frequently or click links from outside the application to open a new browser window or tab to Lightning Experience.

Aura Components in the ui Namespace Are Being Deprecated

Support for the deprecated components ends on May 1, 2021.

DOM API Changes May Require UI Test Updates

The content and structure of HTML, CSS, and the DOM can change at any time and can't be considered a stable API. Automated UI tests that use tools like Selenium WebDriver to reach into component internals require your ongoing maintenance. We're here to help you adapt your automated UI tests for this release.

Develop Flow Screen Components That Work for Multiple Objects (Generally Available)

Now you can create reusable flow screen components that use the generic sObject and sObject[] data types. Build one component that works for multiple objects, rather than one for each individual object. For example, you can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

Create Custom Property Editors for Lightning Web Components (Generally Available)

Create a custom property editor that makes it a snap for an admin to configure a flow screen component in Flow Builder. The custom property editor is simply a Lightning web component.

Create Custom Property Editors That Use Generic SObject and SObject[] Inputs in Flows

You can now create custom property editors for custom invocable actions and screen components that use the generic sObject and sObject[] data types.

Lightning Web Components Playground Retirement

We plan to retire Lightning Web Components Playground on February 1, 2021. Instead, you can develop Lightning web components locally using the Local Development Server (Beta). Local Development enables you to build, run, and test your Lightning web components without deploying your code to a Salesforce org.

Release Updates: Enforcement for Profile-Based Access for@AuraEnabled Apex Classes, and More

We're enforcing the two release updates for Apex classes containing <code>@AuraEnabled</code> methods. There's also a new Enable Secure Static Resources for Lightning Components release update.

SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

Add Custom Buttons to the lightning-input-rich-text Base Component (Beta)

You can add buttons to perform actions that you define, such as inserting an email template, applying formats, or adding a link to your FAQ. You can even open a popup from a custom button. Define a custom button using two new components together, nested in the lightning-input-rich-text component.



Note: As a beta feature, Custom Buttons for lightning-input-rich-text is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Custom Buttons for lightning-input-rich-text in the Lightning Components Development group in the Trailblazer Community.

Where: This change applies to Lightning Experience, Lightning communities, and the Salesforce app.

How: In your lightning-input-rich-text component, place a lightning-rich-text-toolbar-button-group component in a slot named toolbar to contain your custom buttons. Place a lightning-rich-text-toolbar-button component for each custom button inside the lightning-rich-text-toolbar-button-group component.

In the lightning-rich-text-toolbar-button component, display a utility icon on the button using the icon-name attribute, and specify onclick for your button's action.

lightning-rich-text-toolbar-button provides the methods showPopup() and closePopup(), which you can use in your button handler to open and close a popup. Provide the content of the popup by nesting components inside lightning-rich-text-toolbar-button.

This example adds a custom button to apply the code-block style. The lightning-input-rich-text component doesn't include code-block by default. The formats attribute must specify all the formats to allow in the rich text editor, including code-block.

The button handler gets the format that's currently applied, and then sets or unsets the code-block format using the setFormat() method.

```
import { LightningElement } from 'lwc';

export default class CustomButtonDemo extends LightningElement {
   handleCodeBlockButtonClick() {
      const inputRichText = this.template.querySelector('lightning-input-rich-text');
}
```

```
let format = inputRichText.getFormat();

// Set or unset code-block format based on format on current selection
if (format['code-block']) {
    inputRichText.setFormat({ 'code-block': false });
} else {
    inputRichText.setFormat({ 'code-block': true });
}
}
```

SEE ALSO:

Component Reference: lightning-input-rich-text (can be outdated or unavailable during release preview)

Second-Generation Packages Support Lightning Message Channels

Lightning components use message channels to communicate via the Lightning Message Service. You can now include message channels in second-generation packages.

SEE ALSO:

Lightning Web Components Developer Guide: Communicating Across the DOM with Lightning Message Service

Scan a Barcode in a Lightning Web Component (Beta)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way!

Where: This feature is available in Lightning web components when they're running in the Salesforce mobile app or Mobile Publisher.

Why: Improvements to the BarcodeScanner API in this release include the following.

- Added resumeCapture () to allow continuous scanning of multiple barcodes.
- Increased control over the scanning user experience.
- Improved error handling and error responses.

How: Using BarcodeScanner in your Lightning web component is straightforward.

- 1. Import BarcodeScanner into your component definition.
- **2.** Test to make sure BarcodeScanner is available before you call scanning lifecycle functions.
- **3.** Use the scanning lifecycle functions to start and stop scanning.

For complete details, see Scan Barcodes on a Mobile Device in the Lightning Web Components Developer Guide.

Increased Timeout for Client-Side Caching

When a component is generated on the server from metadata, the page loads from a client-side cache of the indexed database. The client-side cache timeout has increased from 15 minutes to 8 hours, with a refresh interval of 15 minutes. This increased timeout can result in faster page loads for users who bootstrap the application frequently or click links from outside the application to open a new browser window or tab to Lightning Experience.

Aura Components in the ui Namespace Are Being Deprecated

Support for the deprecated components ends on May 1, 2021.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app.

When: Support for deprecated Aura components in the ui namespace ends on May 1, 2021. You can continue to use these components beyond May 1, 2021, but we are not accepting support cases for them after that date.

Why: Retiring our legacy components enables us to focus on components that match the latest web standards in performance, accessibility, user experience, and internationalization.

How: Replace the deprecated components with their counterparts in the lightning namespace. These components are faster, more efficient, and they implement Lightning Design System styling out-of-the-box.



Note: Components in the lightning namespace are available in two versions—as Aura components and Lightning web components. We recommend using Lightning web components whenever possible. Lightning web components are custom HTML elements built using HTML and modern JavaScript. Lightning web components and Aura components can coexist and interoperate on a page. To admins and end users, they both appear as Lightning components. See the *Lightning Web Components Developer Guide* for more information.

The deprecated Aura components and their recommended alternatives are listed as follows.

ui:actionMenuItem

Use lightning:menuItem with lightning:buttonMenu instead.

ui:button

Use lightning:button, lightning:buttonIcon, Or lightning:buttonIconStateful.For button groups, use lightning:buttonGroup.

ui:checkboxMenuItem

Use lightning:menuItem with lightning:buttonMenu instead.

ui:inputCheckbox

Use lightning:input with checkbox, toggle, or checkbox-button type instead. For checkbox groups, use lightning:checkboxGroup.

ui:inputCurrency

Use lightning:input with number type and currency formatter instead.

ui:inputDate

Use lightning:input with date type instead.

ui:inputDateTime

Use lightning:input with datetime type instead.

ui:inputDefaultError

Use lightning:input with built-in field validation instead.

ui:inputEmail

Use lightning:input with email type instead.

ui:inputNumber

Use lightning:input with number type instead.

ui:inputPhone

Use lightning:input with phone type instead.

ui:inputRadio

Use lightning:input with radio type instead. For radio groups, use lightning:radioGroup.

ui:inputRichText

Use lightning:inputRichText instead.

ui:inputSecret

Use lightning:input with password type instead.

ui:inputSelect

Use lightning: select or lightning: combobox instead.

ui:inputSelectOption

Use lightning:select or lightning:combobox instead.

ui:inputText

Use lightning:input with text type instead.

ui:inputTextArea

Use lightning:textarea instead.

ui:inputURL

Use lightning:input with url type instead.

ui:menu

Use lightning:buttonMenu instead.

ui:menuItem

Use lightning:menuItem with lightning:buttonMenu instead.

ui:menuItemSeparator

Use lightning:menuDivider with lightning:buttonMenu instead.

ui:menuList

Use lightning:buttonMenu instead.

ui:menuTrigger

Use lightning:buttonMenu instead.

ui:menuTriggerLink

Use lightning:buttonMenu instead.

ui:message

Use lightning:notificationsLibrary instead.

ui:outputCheckbox

Use lightning:input with checkbox type and set readonly to true.

ui:outputCurrency

Use lightning: formattedNumber with style set to currency.

ui:outputDate

Use lightning: formattedDateTime instead.

ui:outputDateTime

Use lightning:formattedDateTime or lightning:formattedTime instead.

ui:outputEmail

Use lightning: formattedEmail instead.

ui:outputNumber

Use lightning: formattedNumber instead.

ui:outputPhone

Use lightning: formattedPhone instead.

ui:outputRichText

Use lightning: formattedRichText instead.

ui:outputText

Use lightning: formattedText instead.

ui:outputTextArea

Use lightning: formattedText instead.

ui:outputURL

Use lightning: formattedUrl instead.

ui:radioMenuItem

Use lightning:menuItem with lightning:buttonMenu instead.

ui:spinner

Use lightning: spinner instead.

DOM API Changes May Require UI Test Updates

The content and structure of HTML, CSS, and the DOM can change at any time and can't be considered a stable API. Automated UI tests that use tools like Selenium WebDriver to reach into component internals require your ongoing maintenance. We're here to help you adapt your automated UI tests for this release.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Why: We're calling out the fragility of these tests due to changes, in particular as Lightning Experience continues to evolve with modern web standards. We understand the value that you gain from automated UI testing and the maintenance burden these changes put on you. Salesforce has never guaranteed backward-compatible HTML, CSS, or DOM.

How: You might encounter issues in your automated UI tests, such as broken locators for related lists, quick action buttons, quick links, picklists, and calendars. For recommendations on how to fix issues, see the Test Automation Trailblazers community group.

Develop Flow Screen Components That Work for Multiple Objects (Generally Available)

Now you can create reusable flow screen components that use the generic sObject and sObject[] data types. Build one component that works for multiple objects, rather than one for each individual object. For example, you can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

Where: This change applies to Lightning web components in Lightning Experience.

SEE ALSO:

Create Flow Screen Components That Work for Multiple Objects (Generally Available)

Create Custom Property Editors for Lightning Web Components (Generally Available)

Create a custom property editor that makes it a snap for an admin to configure a flow screen component in Flow Builder. The custom property editor is simply a Lightning web component.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: See Develop Custom Property Editors for Flow Builder in Lightning Web Components Developer Guide.

SEE ALSO:

Configure Custom Flow Screen Components More Easily (Generally Available)

Create Custom Property Editors That Use Generic SObject and SObject[] Inputs in Flows

You can now create custom property editors for custom invocable actions and screen components that use the generic sobject and sobject[] data types.

Where: This change applies to Lightning web components in Lightning Experience.

How: To provide data about generic sObject inputs, use the new genericTypeMappings interface by including @apigenericTypeMappings in your custom property editor component.

To report input value changes to Flow Builder, use the new configuration_editor_generic_type_mapping_changed event type.

SEE ALSO:

Configure Custom Flow Screen Components and Actions That Work for Multiple Objects More Easily Lightning Web Components Developer Guide: Develop Custom Property Editors for Flow Builder

Lightning Web Components Playground Retirement

We plan to retire Lightning Web Components Playground on February 1, 2021. Instead, you can develop Lightning web components locally using the Local Development Server (Beta). Local Development enables you to build, run, and test your Lightning web components without deploying your code to a Salesforce org.

When: Playground will be retired on February 1, 2021. All saved projects will be permanently deleted.

Why: The Local Development Server is already coupled with your Salesforce DX developer tools as a Salesforce CLI plug-in. And it's fully integrated with Salesforce Extensions for VS Code.

However, if you'd like to edit and preview your components in a browser, you can use a third-party solution, such as webcomponents.dev. It supports the same component types as Playground.

SEE ALSO:

Lightning Web Components Developer Guide: Develop Lightning Web Components Locally (Beta)

Release Updates: Enforcement for Profile-Based Access for@AuraEnabled Apex Classes, and More

We're enforcing the two release updates for Apex classes containing <code>@AuraEnabled</code> methods. There's also a new Enable Secure Static Resources for Lightning Components release update.

Lightning Components: Custom Buttons for the lightning-input-rich-text Base Component, Second-Generation Packages Support Lightning Message Channels

IN THIS SECTION:

Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Enforced)

This update gives you more control over which guest, portal, or community users can access Apex classes containing <code>@AuraEnabled</code> methods. Add guest user profile access to any <code>@AuraEnabled</code> Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)

This update gives you more control over which authenticated users can access Apex classes containing <code>@AuraEnabled</code> methods. When this update is enforced, an authenticated user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Enable Dependency Access Checks In Lightning Components (Update, Retired)

This update has been retired and no longer requires any action.

Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of @AuraEnabled Apex controllers that don't specify with sharing or without sharing to default to with sharing. This update applies only to orgs created after Spring '18 or orgs that activated the retired Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing update that had the opposite effect and set the default to without sharing. Orgs created before Spring '18 already default to with sharing. Those orgs don't see the update unless they enabled the now retired without sharing update.

Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the global access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Winter '21. To improve security and stability, this update prevents attribute values passed to \$A.createComponent() or \$A.createComponents() from being interpreted as Aura function expressions.

Enable Secure Static Resources for Lightning Components (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. To improve security, this update serves all static resources from the visual force domain instead of the lightning domain. This change prevents a script included in a static resource from accessing the document in the lightning domain due to the same-origin security policy.

Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Enforced)

This update gives you more control over which guest, portal, or community users can access Apex classes containing <code>@AuraEnabled</code> methods. Add guest user profile access to any <code>@AuraEnabled</code> Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Where: This change applies to Aura components, Lightning web components, and flows in Lightning communities, portals, and Salesforce Sites.

When: This update was created in Winter '20 and is enforced when a sandbox or production org is upgraded to Winter '21. Enforcement starts for some sandboxes on August 9, 2020. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When this update is activated, a guest, portal, or community user can access an @AuraEnabled Apex method only when the user's profile or a permission set allows access to the Apex class. This update enforces user profile and permission set restrictions for Apex classes used by Aura and Lightning web components.

How: To test this update, we recommend working in a sandbox. After August 12, 2020, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Winter '21.

- 1. From Setup, enter Release Updates in the Quick Find box.
- 2. Select Release Updates.
- **3.** Find Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile, and click **View Details** or click **Get Started**.
- **4.** Test that custom Aura components, Lightning web components, and flows that you developed are working correctly for guest, portal, and community users.
 - Ø

Note: The Guest User Access Report available in this managed package can help you to identify guest user access to Apex classes.

SEE ALSO:

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)

Apex Developer Guide: Class Security

Salesforce Help: Configure the Guest User Profile

Salesforce Help: Enable the Enhanced Profile User Interface

Release Updates

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)

This update gives you more control over which authenticated users can access Apex classes containing <code>@AuraEnabled</code> methods. When this update is enforced, an authenticated user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

When: This update was created in Winter '20 and is enforced when a sandbox or production org is upgraded to Winter '21. Enforcement starts for some sandboxes on August 9, 2020. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This update enforces user profile and permission set restrictions for Apex classes used by Aura and Lightning web components.

How: To test this update, we recommend working in a sandbox. After August 12, 2020, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Winter '21.

- 1. From Setup, enter Release Updates in the Quick Find box.
- 2. Select Release Updates.

Lightning Components: Custom Buttons for the lightning-input-rich-text Base Component, Second-Generation Packages Support Lightning Message Channels

- 3. Find Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile, and click View Details or click Get Started.
- 4. Test that custom Aura or Lightning web components that you developed are working correctly for authenticated users.



SEE ALSO:

Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Enforced)

Apex Developer Guide: Class Security

Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Postponed)

Salesforce Help: Enable the Enhanced Profile User Interface

Release Updates

Enable Dependency Access Checks In Lightning Components (Update, Retired)

This update has been retired and no longer requires any action.

Where: This change applies to Aura components and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

When: This update has been retired and no longer appears in the Release Update page in Setup.

Why: This update affected Salesforce-provided components and we found an alternative solution that doesn't require any action on your part.

SEE ALSO:

Lightning Aura Components Developer Guide: Controlling Access Release Updates

Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of <code>@AuraEnabled</code> Apex controllers that don't specify with sharing or without sharing to default to with sharing. This update applies only to orgs created after Spring '18 or orgs that activated the retired Use without sharing for <code>@AuraEnabled</code> Apex Controllers with Implicit Sharing update that had the opposite effect and set the default to without sharing. Orgs created before Spring '18 already default to with sharing. Those orgs don't see the update unless they enabled the now retired without sharing update.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

When: This update is enforced when a sandbox or production org is upgraded to Spring '21. Enforcement starts for some sandboxes on November 29, 2020. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: An @AuraEnabled Apex class that doesn't explicitly set with sharing or without sharing uses a default or implicit value of with sharing. The purpose of the retired Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing update was to make Apex controllers for Aura components default to without sharing. This behavior made Apex controllers consistent in Aura components and Visualforce pages.

Lightning Components: Custom Buttons for the lightning-input-rich-text Base Component, Second-Generation Packages Support Lightning Message Channels

After further consideration, we decided to ensure that Lightning components are secure by default. So we created this new update that defaults to with sharing for @AuraEnabled Apex classes used by Aura components or Lightning web components.

Apex classes generally run in system mode. Consequently, the current user's credentials aren't used to execute Apex logic, and the user's permissions and field-level security aren't automatically applied.

You can choose whether an Apex class enforces sharing rules by using the with sharing or without sharing keywords. Enforcing sharing rules by using the with sharing keyword doesn't enforce the user's permissions and field-level security. You must manually enforce CRUD permissions and field-level security separately in your Apex classes.

How: The best way to prepare for this update is to ensure that all your <code>@AuraEnabled</code> Apex code explicitly controls sharing behavior using the with <code>sharing</code> or without <code>sharing</code> keywords. If all your <code>@AuraEnabled</code> code explicitly sets sharing behavior, this update has no effect.

To test this update, we recommend working in a sandbox. After November 29, 2020, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Spring '21.

- 1. From Setup, enter Release Updates in the Quick Find box.
- 2. Select Release Updates.
- 3. Find Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing, and click View Details or Get Started.
- **4.** Test the behavior of components that use Apex classes that don't include the with sharing or without sharing keywords.

SEE ALSO:

Apex Developer Guide: Enforcing Sharing Rules
Winter '20 Release Notes: Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Critical Update, Retired)
Release Updates

Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the global access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

Where: This change applies to orgs with Aura components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

When: This update was created in Summer '17 and is enforced when a sandbox or production org is upgraded to Summer '21. Enforcement starts for some sandboxes on April 4, 2021. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When added to a managed package, only Apex controller methods marked global are accessible by Aura components outside of that managed package's namespace. Methods marked public in their Apex definitions are accessible only to Aura components included in the package's namespace. When this update is enabled, these rules are enforced.

Prior to this update, Aura components outside of the package namespace could access non-global methods (Apex controller methods not marked with the global access modifier).

When this update is enabled, if your code incorrectly depends on non-global Apex methods in a managed package, server actions that call those methods fail. Update your code to use only the supported API methods provided by the package as global methods.



Note: An Aura component outside the package can access a public Apex method installed from a non-namespaced unlocked package. The Aura component can be installed from another package or created in the org. For accessing Apex methods, a non-namespaced unlocked package is treated the same as an unmanaged package.

How: To test this update, we recommend working in a sandbox. After April 4, 2021, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Summer '21.

- 1. From Setup, enter Release Updates in the Quick Find box.
- 2. Select Release Updates.
- 3. Find Disable Access to Non-global Controller Methods in Managed Packages, and click View Details or Get Started.
- **4.** Test that your custom Aura components are working correctly.

SEE ALSO:

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)
Release Updates

Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

When: This update is enforced when a sandbox or production org is upgraded to Summer '21. Enforcement starts for some sandboxes on April 4, 2021. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Let's look at an example for an Apex class with a private getter for a counter class property.

```
public class EnforcePrivateGetter {
    @AuraEnabled

public Integer counter { private get; set; }

@AuraEnabled
public static EnforcePrivateGetter GetRepro2()
{
    EnforcePrivateGetter result = new EnforcePrivateGetter();
    result.counter = 2;
    return result;
}
```

With the update enabled, this Aura component can't access the private getter with the {!v.apexObject.counter} expression. The same restriction applies for a Lightning web component.

```
counter = {!v.apexObject.counter} <br></br>
</aura:component>
```

Here's the JavaScript controller.

```
doInit : function(cmp, ev) {
    var action = cmp.get("c.GetRepro2");

    action.setCallback(this, function(response) {
        var state = response.getState();
        if (state === "SUCCESS") {
            cmp.set('v.apexObject', response.getReturnValue());
        }
        else if (state === "ERROR") {
            console.log('Error : ' + JSON.stringify(errors));
        }
    });
    $A.enqueueAction(action);
}
```

With the update enabled, the fix is to remove the private access modifier on the getter and change the class variable definition to:

```
public Integer counter { get; set; }
```

To make an Apex property readable outside the Apex class, the property can't have a private or protected access modifier.

How: To test this update, we recommend working in a sandbox. After April 4, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Summer '21.

- 1. From Setup, enter Release Updates in the Quick Find box.
- 2. Select Release Updates.
- 3. Find "Enforce Access Modifiers on Apex Properties in Lightning Component Markup" and click View Details or click Get Started.
- 4. Test the behavior of components that use Apex classes with private or protected access modifiers on getters.

SEE ALSO:

Release Updates

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Winter '21. To improve security and stability, this update prevents attribute values passed to \$A.createComponent() or \$A.createComponents() from being interpreted as Aura function expressions.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

When: This update was created in Summer '19 and is enforced when a sandbox or production org is upgraded to Spring '21. Enforcement starts for some sandboxes on November 29, 2020. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When the update is activated, using the key-value pair {"exprType": "FUNCTION"} in an object passed as an attribute value to \$A.createComponents() or \$A.createComponents() throws an error instead of triggering unpredictable behavior

Enable Secure Static Resources for Lightning Components (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. To improve security, this update serves all static resources from the visualforce domain instead of the lightning domain. This change prevents a script included in a static resource from accessing the document in the lightning domain due to the same-origin security policy.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

When: This update is enforced when a sandbox or production org is upgraded to Summer '21. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To test this update, we recommend working in a sandbox.

To enable this update, from Setup, in the Quick Find box, enter Release Updates, then select **Release Updates**. For Enable Secure Static Resources for Lightning Components, follow the testing and activation steps.

SEE ALSO:

Lightning Components Developer Guide: \$Resource
Lightning Web Components Developer Guide: Access Static Resources
Release Updates

Einstein Vision and Language: Image Recognition and Natural Language Processing

Not a data scientist or machine-learning expert but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

IN THIS SECTION:

Download the Einstein Vision and Language OpenAPI Spec

The OpenAPI specification file enables you to learn and interact with API elements, including all available endpoints and input and output representations. The Salesforce Einstein Vision and Language REST APIs are described using the OpenAPI 3.0 specification (OAS3).

Einstein Vision: Endpoint That Returns Labels Is Deprecated and Replaced

The Einstein Vision endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format.

Einstein Language: Build Einstein Intent Models in More Languages

Einstein Intent now supports these languages: Brazilian Portuguese (beta), Dutch (beta), and Russian (beta).

Download the Einstein Vision and Language OpenAPI Spec

The OpenAPI specification file enables you to learn and interact with API elements, including all available endpoints and input and output representations. The Salesforce Einstein Vision and Language REST APIs are described using the OpenAPI 3.0 specification (OAS3).

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: Download the OpenAPI spec file from GitHub. You can use the Swagger Editor or any editor that supports OAS3 to view the spec file.

SEE ALSO:

Einstein Platform Services Developer Guide: Einstein Platform Services APIs

Einstein Vision: Endpoint That Returns Labels Is Deprecated and Replaced

The Einstein Vision endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format.

IN THIS SECTION:

Einstein Vision Endpoint That Returns Examples Is Deprecated

The Einstein Vision endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format. Be sure to update any calls to the old endpoint to use the new endpoint.

SEE ALSO:

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Einstein Vision Endpoint That Returns Examples Is Deprecated

The Einstein Vision endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format. Be sure to update any calls to the old endpoint to use the new endpoint.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

When: This change is as of December 3, 2020. The old endpoint continues to work for datasets created before December 3, 2020. For datasets created after December 3, you must use the new endpoint.

How: The endpoint that returns all examples for a specific label is being deprecated. That endpoint takes the label ID as a query parameter and looks like this.

https://api.einstein.ai/v2/vision/examples?labelId=<LABEL_ID>

The new endpoint that returns all examples for a specific label has a dataset ID resource and a label ID resource and looks like this.

https://api.einstein.ai/v2/vision/examples/{datasetId}/label/{labelId}

SEE ALSO:

Einstein Platform Services Developer Guide: Get All Examples For Label

Einstein Language: Build Einstein Intent Models in More Languages

Einstein Intent now supports these languages: Brazilian Portuguese (beta), Dutch (beta), and Russian (beta).

IN THIS SECTION:

Einstein Intent Supports More Languages (Beta)

Einstein Intent datasets and models now support more languages: Brazilian Portuguese (beta), Dutch (beta), and Russian (beta). When you create an intent dataset, you specify the language. When you train that dataset, the model inherits the language of the dataset.

Einstein Language Endpoint That Returns Examples Is Deprecated

The Einstein Language endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format. Be sure to update any calls to the old endpoint to use the new endpoint.

SEE ALSO:

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language

Salesforce Einstein: Build Bots Faster with Templates, Make Opportunity Scoring More Relevant with Filters, and Search Personalization Is Generally Available

Einstein Intent Supports More Languages (Beta)

Einstein Intent datasets and models now support more languages: Brazilian Portuguese (beta), Dutch (beta), and Russian (beta). When you create an intent dataset, you specify the language. When you train that dataset, the model inherits the language of the dataset.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

As a beta feature, Brazilian Portuguese, Dutch, and Russian language support is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

How: When you create the dataset, you specify the language in the language parameter. When you train the dataset to create a model, you pass in the algorithm parameter with a value of multilingual-intent or multilingual-intent-ood (to create a model that handles out-of-domain predictions). These calls take the language parameter.

- Create a dataset asynchronously—POST /v2/language/datasets/upload
- Create a dataset synchronously—POST /v2/language/datasets/upload/sync

These calls take the algorithm parameter.

• Train a dataset—POST /v2/language/train

Retrain a dataset—POST /v2/language/retrain

SEE ALSO:

Einstein Platform Services Developer Guide: Supported Languages

Einstein Platform Services Developer Guide: Create a Dataset From a File Asynchronously

Einstein Platform Services Developer Guide: Create a Dataset Synchronously

Einstein Platform Services Developer Guide: Train a Dataset

Einstein Platform Services Developer Guide: Retrain a Dataset

Einstein Language Endpoint That Returns Examples Is Deprecated

The Einstein Language endpoint that returns all examples for a specific label is deprecated as of December 3, 2020. This endpoint is replaced by a new endpoint that has a different format. Be sure to update any calls to the old endpoint to use the new endpoint.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

When: This change is as of December 3, 2020. The old endpoint continues to work for datasets created before December 3, 2020. For datasets created after December 3, you must use the new endpoint.

How: The endpoint that returns all examples for a specific label is being deprecated. That endpoint takes the label ID as a query parameter and looks like this.

https://api.einstein.ai/v2/language/examples?labelId=<LABEL ID>

The new endpoint that returns all examples for a specific label has a dataset ID resource and a label ID resource and looks like this.

https://api.einstein.ai/v2/language/examples/{datasetId}/label/{labelId}

SEE ALSO:

Einstein Platform Services Developer Guide: Get All Examples For Label

Visualforce: Lightning Message Channels in Second-Generation Packages and Shortened URLs

You can now include message channels in second-generation packages. The release update that removes instance names from some URLs is activated in Summer '21.

IN THIS SECTION:

Second-Generation Packages Support Lightning Message Channels

Visualforce pages use message channels to communicate via the Lightning Message Service. You can now include message channels in second-generation packages.

Shorten Your Visualforce URLs

We're removing the instance names from Visualforce and other URLs through a release update. The Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files update is enforced in Summer '22.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Update, Postponed)

This update, released in Summer '20, was scheduled for auto-activation in Spring '21, but has been postponed to Winter '22. In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

New Attribute on <apex:inputField> Overrides Entity Edit Permissions

The new ignoreEditPermissionForRendering attribute on <apex:inputField> allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits.

SEE ALSO:

Visualforce Developer Guide

Second-Generation Packages Support Lightning Message Channels

Visualforce pages use message channels to communicate via the Lightning Message Service. You can now include message channels in second-generation packages.

SEE ALSO:

Visualforce Developer Guide: Communicating Across the DOM with Lightning Message Service

Shorten Your Visualforce URLs

We're removing the instance names from Visualforce and other URLs through a release update. The Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files update is enforced in Summer '22.

Where: This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

Prevent Consecutive API Navigation Calls in Visualforce Pages (Update, Postponed)

This update, released in Summer '20, was scheduled for auto-activation in Spring '21, but has been postponed to Winter '22. In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

Where: This change applies to Lightning Experience in all editions.

When: Salesforce enforces this update in Winter '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Firing consecutive API navigation calls in a Visualforce page can lead to unwanted behavior due to competing API calls. To prevent any issues, with this release update, only the first API navigation call is accepted. This release update ensures predictable and stable behavior in your org.

How: Any Visualforce pages that use this API navigation pattern are impacted. Review all affected Visualforce pages. Salesforce will provide a replacement pattern in the future. Alternatively, edit your pages to use Lightning components instead.

SEE ALSO:

Release Updates

New Attribute on <apex:inputField> Overrides Entity Edit Permissions

The new ignoreEditPermissionForRendering attribute on <apex:inputField> allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits.

SEE ALSO:

Override Entity Permissions When Using <apex:inputField>

Apex

Avoid null pointer exceptions by using the safe navigation operator (?.). Make partial or full updates to a resource in an HTTP web service by specifying the PATCH method in the HttpRequest class. Create, configure, and send custom notifications directly from Apex code using the Messaging.CustomNotification class. Detect Apex runtime context using Requestld and Quiddity values. Improve Apex testing with the new SObject error methods. The Database.deleteImmediate() method now supports batch deletes of up to 50,000 big object records at once. The @namespaceAccessible annotation provides enhanced support for accessing Apex in second-generation packages.

For more information on these enhancements, refer to the Apex Developer Guide.

IN THIS SECTION:

Use the Safe Navigation Operator to Avoid Null Pointer Exceptions

Use the safe navigation operator (?.) to replace explicit, sequential checks for null references. This new operator short-circuits expressions that attempt to operate on a null value and returns null instead of throwing a NullPointerException.

Update Resources with the PATCH HTTP Method in Apex Callouts

To make partial or full updates to a resource in an HTTP web service, specify the PATCH method in the HttpRequest class. Previously, only the PUT method was supported for full updates.

Send Custom Notifications from Apex

Use the Messaging. CustomNotification class to create, configure, and send custom notifications directly from Apex code, such as a trigger.

Detect Apex Runtime Context with Requestld and Quiddity

You can now detect Apex context at runtime and correlate multiple logs triggered by the request, using Request ID and Quiddity values. Use the methods in the System. Request class to obtain the Request ID and Quiddity of the current Salesforce request.

Improve Apex Testing with New SObject Error Methods

Track errors with the new SObject.hasErrors() and SObject.getErrors() methods without performing a DML operation to check the result for errors. Dynamically add errors to specific fields with new SObject.addError() overload methods. Use the hasErrors() method to know if an SObject instance contains errors. Use the getErrors() method to retrieve the list of errors for a specific SObject instance.

Delete up to 50,000 Big Object Records in a Batch

The Database.deleteImmediate() method now supports batch deletes of up to 50,000 big object records at once. This new limit matches the total number of records you can retrieve with a SOQL guery.

Enhanced Support for @namespaceAccessible Annotation

The @namespaceAccessible annotation provides enhanced support for accessing interfaces, properties, and abstract classes in second-generation packages.

SEE ALSO:

Apex: New and Changed Items

Use the Safe Navigation Operator to Avoid Null Pointer Exceptions

Use the safe navigation operator (?.) to replace explicit, sequential checks for null references. This new operator short-circuits expressions that attempt to operate on a null value and returns null instead of throwing a NullPointerException.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: If the left-hand-side of the chain expression evaluates to null, the right-hand-side is not evaluated. Use the safe navigation operator (?.) in method, variable, and property chaining. The part of the expression that is not evaluated can include variable references, method references, or array expressions.

- Note: All Apex types are implicitly nullable and can hold a null value returned from the operator.
- Example:
 - This example first evaluates a, and returns null if a is null. Otherwise, the return value is a.b.

```
a?.b // Evaluates to: a == null? Null : a.b
```

• This example returns null if a [x] evaluates to null. If a [x] does not evaluate to null and aMethod() returns null, then this expression throws a null pointer exception.

```
a[x]?.aMethod().aField // Evaluates to null if a[x] == null
```

• This example returns null if a [x].aMethod() evaluates to null.

```
a[x].aMethod()?.aField
```

• This example indicates that the type of the expression is the same, whether the safe navigation operator is used in the expression or not.

```
Integer x = anObject?.anIntegerField; // The expression is of type Integer because the field is of type Integer
```

This example shows a single statement replacing a block of code that checks for nulls.

```
// Previous code checking for nulls
String profileUrl = null;
if (user.getProfileUrl() != null) {
  profileUrl = user.getProfileUrl().toExternalForm();
}
```

```
// New code using the safe navigation operator
String profileUrl = user.getProfileUrl()?.toExternalForm();
```

This example shows a single-row SOQL query using the safe navigation operator.

```
// Previous code checking for nulls
results = [SELECT Name FROM Account WHERE Id = :accId];
if (results.size() == 0) { // Account was deleted
    return null;
}
return results[0].Name;

// New code using the safe navigation operator
return [SELECT Name FROM Account WHERE Id = :accId]?.Name;
```

SEE ALSO:

Apex Developer Guide: Safe Navigation Operator (can be outdated or unavailable during release preview)

Update Resources with the PATCH HTTP Method in Apex Callouts

To make partial or full updates to a resource in an HTTP web service, specify the PATCH method in the HttpRequest class. Previously, only the PUT method was supported for full updates.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

IdeaExchange: Add support for HTTP PATCH verb

Apex Developer Guide: HTTP Classes (can be outdated or unavailable during release preview)

IETF RFC 5789: PATCH Method for HTTP

Send Custom Notifications from Apex

Use the Messaging. CustomNotification class to create, configure, and send custom notifications directly from Apex code, such as a trigger.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

Why: Rather than make API callouts from Apex, use CustomNotification to send notifications. It requires fewer lines of code, and avoids API callout and authentication complexity. It's also more efficient, which is especially helpful when you're sending notifications from triggers, or sending many notifications.

How: Using the Messaging. CustomNotification class to create and send custom notifications from Apex is easy. Create a new instance of CustomNotification, configure a few notification details, and call the send() method.

SEE ALSO:

Salesforce Help: Send Custom Notifications

Apex Developer Guide: CustomNotification Class (can be outdated or unavailable during release preview)

Detect Apex Runtime Context with Requestld and Quiddity

You can now detect Apex context at runtime and correlate multiple logs triggered by the request, using Request ID and Quiddity values. Use the methods in the System. Request class to obtain the Request ID and Quiddity of the current Salesforce request.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: First, use the Request.getCurrent() method to retrieve the Request object that contains the current Request ID and Quiddity. To retrieve the Request ID from the Request object, use the Request.getRequestId() method. To retrieve Quiddity and its short-code, use the Request.getQuiddity() and System.getQuiddityShortCode() methods.

The Request ID and Quiddity values can be used to effectively correlate logs:

- The Request ID is universally unique and is captured in the debug logs triggered by the request.
- The Request ID and Quiddity values are the same as in the event log files of the Apex Execution event type used in Event Monitoring.



Example: This example shows how to retrieve and use Request ID and Quiddity.

```
//Get info about the current request
Request reqInfo = Request.getCurrent();

//Universally unique identifier for this request
//Same as requestId in splunk or REQUEST_ID in event monitoring
String currentRequestId = reqInfo.getRequestId();

//enum representing how Apex is running. e.g. BULK_API vs LIGHTNING
//Use this with a switch statement,
//instead of checking System.isFuture() || System.isQueueable() || ...
Quiddity currentType = reqInfo.getQuiddity();
```

Improve Apex Testing with New SObject Error Methods

Track errors with the new SObject.hasErrors() and SObject.getErrors() methods without performing a DML operation to check the result for errors. Dynamically add errors to specific fields with new SObject.addError() overload methods. Use the hasErrors() method to know if an SObject instance contains errors. Use the getErrors() method to retrieve the list of errors for a specific SObject instance.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: If the SObject.addError() method has been called on an SObject instance, the SObject.hasErrors() method returns a list of Database.Error objects that contain the errors encountered.

This example code shows usage of the new SObject error methods.

```
//Baseline code sample for using addError, getErrors, together
   Account a = new Account();
   String msg = 'New error method in SObject';
   //The new overload that accepts the field dynamically at runtime
   a.addError('Name', msg);
   List<Database.Error> errors = a.getErrors();
   System.assertEquals(1, errors.size());
   Database.Error error = errors.get(0);
   System.assertEquals(msg, error.getMessage());
   System.assertEquals(StatusCode.FIELD_CUSTOM_VALIDATION_EXCEPTION, error.getStatusCode());
   String[] fields = error.getFields();
   System.assertNotEquals(null, fields);
   System.assertEquals(1, fields.size());
```

Delete up to 50,000 Big Object Records in a Batch

The Database.deleteImmediate() method now supports batch deletes of up to 50,000 big object records at once. This new limit matches the total number of records you can retrieve with a SOQL query.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Enhanced Support for @namespaceAccessible Annotation

The @namespaceAccessible annotation provides enhanced support for accessing interfaces, properties, and abstract classes in second-generation packages.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: The @namespaceAccessible annotation improvements include:

- The @namespaceAccessible annotation now supports interfaces, properties, and abstract classes.
- A public or protected variable or method with the @namespaceAccessible annotation must be in a class that is declared as public and annotated with @namespaceAccessible.
- A public or protected inner class with @namespaceAccessible annotation must be enclosed in an outer class that is declared as public and annotated with @namespaceAccessible.

The enhancements on the @namespaceAccessible annotation are supported in API version 50.0 and later.

SEE ALSO:

Apex Developer Guide: NamespaceAccessible Annotation (can be outdated or unavailable during release preview)

API

In API version 50.0, use the new /composite/graph resource.

IN THIS SECTION:

Make More Powerful Composite Requests

A new REST resource for Composite requests is now generally available.

Make More Powerful Composite Requests

A new REST resource for Composite requests is now generally available.

Where: This launch applies to Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions.

Why: Using the power of collation, the Composite Graph resource is optimized for processing CRUD operations on sObjects. It expands the power of standard Composite requests by allowing you to assemble a more complicated and complete series of related objects and records. For example, composite graphs ensure that the steps in a given set of operations are either all completed or all terminated. It's no longer necessary to check for a mix of successful and unsuccessful results. The Composite Graph resource payload increases the subrequest limit to 500 per payload, up from 25 per Standard Composite payload. A single API call can now do much more.

How: Use the new /composite/graph resource.

Packaging: Package Ancestry Visualizations, Unwanted Package Versions Are Deletable, Push Upgrades Are Generally Available

Use Salesforce CLI to visualize your package ancestry tree. Delete unwanted and unreleased unlocked or second-generation managed package versions. Specify a user to receive email notifications for package errors. Push upgrades are generally available for unlocked and second-generation managed packages.

IN THIS SECTION:

Visualize Package Ancestry Tree Using Salesforce CLI

Package ancestry supports the flexibility of branch versioning so that you can abandon a package version you no longer want to build on. Use the displayancestry CLI command to create visualizations of your package or package version's ancestry tree. You can view the visualization in Salesforce CLI or use the dotcode parameter to generate output that can be used in graph visualization software.

Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages (Generally Available)

The PackagePushRequest SOAP API object is extended to enable push upgrades to unlocked and second-generation managed packages. You can choose which Salesforce orgs receive a package upgrade, what version the package is upgraded to, and when you want the upgrade to occur. Query the PackagePushJob and PackagePushError SOAP API objects to track the status of each job, see which upgrades succeeded, and review any error messages.

Delete Unwanted Packages and Package Versions

Use force:package:version:delete and force:package:delete Salesforce CLI commands to delete unreleased packages you no longer need. Deleted package or package versions can't be recovered, or specified as a dependency, and any new installations of the package will fail. Released versions of second-generation managed packages can't be deleted.

Get Package Error Notifications

Designate an active Dev Hub org user to receive email notifications for Apex gacks, and install, upgrade, or uninstall failures associated with your packages. Use the errornotificationusername parameter when creating or updating a package in Salesforce CLI.

Code Coverage Enforcement for Unlocked Packages

Meeting code coverage requirements helps validate that the Apex code in your unlocked packages has adequate test coverage. Starting in Winter '21, a minimum 75% code coverage is required for package version promotion. Package versions created in Winter '21 and later that don't meet this code coverage can be installed only in scratch orgs and sandboxes.

Specify Unpackaged Metadata for Package Version Creation Tests (Pilot)

If there are scenarios where you require metadata that shouldn't be part of your package, but is necessary for Apex test runs during package version creation, you can specify the path containing unpackaged metadata in the sfdx-project.json file. Unpackaged metadata isn't included in the package and isn't installed in subscriber orgs.

Ensure That Multi-Factor Authentication Is Configured for License Management Orgs

We're heightening our security measures by requiring multi-factor authentication (MFA) on all subscriber org logins initiated from the Subscriber Support Console. We recommend enabling MFA on your License Management Org (LMO), even if you don't log into subscriber orgs using the console.

Branch Packaging Orgs Are No Longer Available

We're discontinuing the pilot for branch packaging orgs, and starting in Spring '21, branch orgs can no longer be created. Use scratch orgs in place of branch packaging orgs.

Visualize Package Ancestry Tree Using Salesforce CLI

Package ancestry supports the flexibility of branch versioning so that you can abandon a package version you no longer want to build on. Use the displayancestry CLI command to create visualizations of your package or package version's ancestry tree. You can view the visualization in Salesforce CLI or use the dotcode parameter to generate output that can be used in graph visualization software

Where: This change applies to second-generation managed packages.

When: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

How: Use sfdx force:package:version:displayancestry to quickly visualize your package ancestry and understand the possible package upgrade paths.

```
$ sfdx force:package:version:displayancestry --package 0Hoxx0000004V00CAU
   0.1.0.1
   - 0.2.0.1
    - 0.2.0.2
      - 0.3.0.1
       0.3.0.2
       0.3.0.3
        0.4.0.1
       1.0.0.1
        - 1.1.0.1
       1.0.0.2
$ sfdx force:package:version:displayancestry --package 04txx0000004k94AAA
0.2.0.2 -> 0.1.0.1 (root)
   0.2.0.2
    - 0.3.0.1
     0.3.0.2
     0.3.0.3
      - 0.4.0.1
     1.0.0.1
       1.1.0.1
     1.0.0.2
```

To generate dotcode output, specify sfdx force:package:version:displayancestry --dotcode.

Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages (Generally Available)

The PackagePushRequest SOAP API object is extended to enable push upgrades to unlocked and second-generation managed packages. You can choose which Salesforce orgs receive a package upgrade, what version the package is upgraded to, and when you want the upgrade to occur. Query the PackagePushJob and PackagePushError SOAP API objects to track the status of each job, see which upgrades succeeded, and review any error messages.

Where: This change applies to installed versions of unlocked and second-generation managed packages.

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

Why: Owners of unlocked and second-generation managed packages can now push package upgrades without burdening subscribers with upgrading. This functionality is crucial if you must push a change for a hot bug fix.

SEE ALSO:

Salesforce DX Developer Guide: Push a Package Upgrade SOAP API Developer Guide: PackagePushRequest SOAP API Developer Guide: PackagePushJob

Delete Unwanted Packages and Package Versions

Use force:package:version:delete and force:package:delete Salesforce CLI commands to delete unreleased packages you no longer need. Deleted package or package versions can't be recovered, or specified as a dependency, and any new installations of the package will fail. Released versions of second-generation managed packages can't be deleted.

Where: This change applies to second-generation managed packages and unlocked packages.

Who: Users need the Create and Update Second-Generation Packages permission and Delete Second-Generation Packages permission.

Get Package Error Notifications

Designate an active Dev Hub org user to receive email notifications for Apex gacks, and install, upgrade, or uninstall failures associated with your packages. Use the errornotificationusername parameter when creating or updating a package in Salesforce CLI.

Where: This change applies to second-generation managed packages and unlocked packages created using Salesforce CLI or Tooling API.

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

How: In Salesforce CLI run sfdx force:package:create --errornotificationusername or sfdx force:package:update --errornotificationusername. In Tooling API, use the PackageErrorUsername field on the Package2 object.

Code Coverage Enforcement for Unlocked Packages

Meeting code coverage requirements helps validate that the Apex code in your unlocked packages has adequate test coverage. Starting in Winter '21, a minimum 75% code coverage is required for package version promotion. Package versions created in Winter '21 and later that don't meet this code coverage can be installed only in scratch orgs and sandboxes.

Where: This change applies to unlocked package versions created using Salesforce CLI or Tooling API.

How: You can use the codecoverage CLI parameter on the force:package:version:createor the CalculateCodeCoverage field in the Package2VersionCreateRequest object when you create a package version.

Unlocked package versions that were promoted to the released state before Winter '21 aren't subject to code coverage requirements.

SEE ALSO:

Salesforce DX Developer Guide: Code Coverage for Unlocked Packages

Specify Unpackaged Metadata for Package Version Creation Tests (Pilot)

If there are scenarios where you require metadata that shouldn't be part of your package, but is necessary for Apex test runs during package version creation, you can specify the path containing unpackaged metadata in the sfdx-project.json file. Unpackaged metadata isn't included in the package and isn't installed in subscriber orgs.

Where: This change applies to second-generation managed packages and unlocked packages created using Salesforce CLI.

We provide unpackaged metadata path to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Unpackaged metadata path isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for unpackaged metadata path in the Managed Packages group in the Partner Community

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

How: To join the pilot, log a case at https://partners.salesforce.com/partnerSupport.

After the pilot is enabled in your org, specify the path to the unpackaged metadata in your sfdx-project.json file.

In this example, metadata in the my-unpackaged-directory is available for test runs during the package version creation of the TV_unl package.

Ensure That Multi-Factor Authentication Is Configured for License Management Orgs

We're heightening our security measures by requiring multi-factor authentication (MFA) on all subscriber org logins initiated from the Subscriber Support Console. We recommend enabling MFA on your License Management Org (LMO), even if you don't log into subscriber orgs using the console.

When: Starting in Summer '21, multi-factor authentication is required to log into subscriber orgs from the Subscriber Support Console.

How: To set up multi-factor authentication for your LMO, see Set Multi-Factor Authentication Login Requirements.

Branch Packaging Orgs Are No Longer Available

We're discontinuing the pilot for branch packaging orgs, and starting in Spring '21, branch orgs can no longer be created. Use scratch orgs in place of branch packaging orgs.

Where: This change applies to branch packaging orgs used in the development of first-generation managed packages.

When: This change takes effect in Spring '21.

How: For more information on creating and using scratch orgs, see Scratch Orgs.

Scratch Orgs: Org Shape and New Features

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

For more information, see Scratch Orgs in the Salesforce DX Developer Guide.

IN THIS SECTION:

Create Scratch Orgs More Easily Using an Org's Shape (Beta)

Features, settings, limits, and licenses determine what we refer to as an org's shape. We know it's not easy to build a scratch org definition that mirrors the features and settings in your production org. With Org Shape for Scratch Orgs, you can leave building the scratch org definition to us. After you capture the org's shape, you can spin up scratch orgs based on it with minor assembly required.

Create Scratch Orgs with More Features

We're providing more configurable features for scratch orgs.

Create Scratch Orgs More Easily Using an Org's Shape (Beta)

Features, settings, limits, and licenses determine what we refer to as an org's shape. We know it's not easy to build a scratch org definition that mirrors the features and settings in your production org. With Org Shape for Scratch Orgs, you can leave building the scratch org definition to us. After you capture the org's shape, you can spin up scratch orgs based on it with minor assembly required.



Note: As a beta feature, Org Shape for Scratch Orgs is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions in the Org Shape for Scratch Orgs Trailblazer group.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Developer, Enterprise, Group, and Professional editions.

How: Enable Org Shape for Scratch Orgs in the org whose shape you want to capture (source org).

- 1. As an admin, log in to the source org.
- 2. From Setup, enter Org Shape in the Quick Find box, then select Org Shape.
- 3. Click Enable Org Shape for Scratch Orgs (Beta).
- 4. If your source org is different from your Dev Hub org, enter the Dev Hub org ID to the list of allowed Dev Hub orgs.
- **5.** Create a scratch org shape for the source org.
- **6.** Create a scratch org definition file that contains the 15-character source org ID, the only required option.

```
{
  "orgName": "Salesforce",
  "sourceOrg": "00DB1230400Ifx5"
}
```

7. Create a scratch org.

SEE ALSO:

Salesforce DX Developer Guide: Create a Scratch Org Based on an Org Shape (Beta) Salesforce CLI Reference Guide: org Commands

Create Scratch Orgs with More Features

We're providing more configurable features for scratch orgs.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Developer, Enterprise, Group, and Professional editions.

How: Add the features to your scratch org definition file.

- FieldServiceDispatcherUser:<value>
- FieldServiceMobileUser:<value>
- FieldServiceSchedulingUser:<value>

Changed Scratch Org Features

FieldService requires a quantity between 1–25.

```
FieldService: < value>
```

Deprecated Scratch Org Features

This scratch org feature was deprecated in Winter '21. If your scratch org definition file specifies this feature, delete it from the file. You'll receive a warning in Winter '21; the feature will be deprecated in Spring '21.

ContactsToMultipleAccounts (Remove the feature, then add the enableRelateContactsToMultipleAccounts setting to your scratch org definition file.)

SEE ALSO:

Salesforce DX Developer Guide: Scratch Org Features

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy. The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

Salesforce Extensions for Visual Studio Code

This extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor. Read the weekly release notes to learn about recent updates.

Salesforce CLI

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about recent updates of the core salesforcedx plug-in.

IN THIS SECTION:

Install the Pre-Release Version of Salesforce CLI

During sandbox preview, we provide a pre-release of the salesforcedx plug-in that contains updates that work only with the new features in the preview. If you want to test these new features, install the pre-release of salesforcedx to access these new commands and parameters.

SEE ALSO:

Salesforce Extensions for Visual Studio Code
Salesforce CLI Command Reference

Install the Pre-Release Version of Salesforce CLL

During sandbox preview, we provide a pre-release of the salesforcedx plug-in that contains updates that work only with the new features in the preview. If you want to test these new features, install the pre-release of salesforcedx to access these new commands and parameters.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions.

Who: Most Salesforce CLI users remain on the current release of the salesforcedx plug-in. Install the pre-release only if you know that it contains a feature you want to explore.

How: Run this command to install the pre-release:

```
sfdx plugins:install salesforcedx@pre-release
```

To check your version information, run this command, and look for salesforcedx in the output:

```
sfdx plugins --core
```

When the sandbox preview is over and all Salesforce orgs are upgraded to production, uninstall the pre-release plug-in. Then run the update command to ensure that you're on the released version of the plug-in.

```
sfdx plugins:uninstall salesforcedx
sfdx update
sfdx plugins --core
```

Lightning Design System: Styling Hooks and Other Component Blueprint Enhancements

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with the Salesforce Lightning principles, design language, and best practices. In this release, we implemented styling hooks so you can customize component styles for your branding.

We frequently update component blueprints and fix bugs. For the latest changes, see What's New in the Lightning Design System documentation. That page lists the changes by the date we completed the change. Those changes are rolled up into the next major Salesforce release. Here are some highlights for Winter '21.

IN THIS SECTION:

Customize Components with Lightning Design System Styling Hooks (Beta)

Lightning Design System Styling Hooks provide you with a set of CSS custom properties so you can customize a component's look and feel. In Winter '21, a limited set of CSS custom properties is available for component-level customizations.

BEM Notation with Double Dashes Is Being Deprecated

The BEM notation with double dashes (--) in Lightning Design System will be deprecated in Summer '21 and replaced by the single underscore notation ().

Lightning Design System Component Blueprint Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

Customize Components with Lightning Design System Styling Hooks (Beta)

Lightning Design System Styling Hooks provide you with a set of CSS custom properties so you can customize a component's look and feel. In Winter '21, a limited set of CSS custom properties is available for component-level customizations.



Note: As a beta feature, Lightning Design System Styling Hooks is a preview. It isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee the general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as-is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Lightning Design System Styling Hooks in the IdeaExchange group in the Trailblazer Community.

Why: Styling hooks make it easy to customize component styling and express your brand, especially when working with web components and shadow DOM. For a list of component blueprints that support styling hooks, see the Lightning Design System website.

How: Styling hooks are placeholders in the Lightning Design System stylesheet, for example, var (--sds-c-badge--color-background, #ecebea), which enable you to use the corresponding --sds-c-badge-color-background CSS custom property with your own styling.

A CSS custom property corresponds to a Lightning Design System component blueprint and its design variations. Let's take a look at a Lightning web component that implements the button blueprint with the brand variation, which turns the background color a standard Salesforce blue.

To apply a different background color to the brand variation, specify the corresponding CSS custom property. In this case, declare your style via the <code>--sds-c-button-brand-color-background</code> custom property. To target all elements in a component with your custom styles, use the <code>:host</code> selector.



Note: Alternatively, you can scope your customizations using other selectors, such as an element or custom class. For more information, see the Lightning Design System website.

```
:host {
    --sds-c-button-brand-color-background: orange;
    --sds-c-button-brand-color-border: orange;
    /* Other CSS custom properties here */
}
```

This CSS declaration turns your button elements with the slds-button brand class orange.

If you are overriding the styles by targeting an SLDS class name in your template, replace them with CSS custom properties instead. For example, replace the following style override with --sds-c-button-brand-color-background.

```
/* Replace this CSS rule with
   the --sds-c-button-brand-* custom properties
```

```
as shown in the previous example */
.slds-button_brand {
   background-color: orange;
}
```

Let's take a look at base components next. Base components implement Lightning Design System blueprints and design variations. Previously, you couldn't customize the style on a base component easily. To customize the style on a base component, such as lightning-button, specify the corresponding CSS custom property.



Tip: You can look at how we implement Lightning Design System in many of the base components in the Base Components Recipes GitHub repository. For interactive examples of the base components, see the Component Reference.

SEE ALSO:

Lightning Web Components Developer Guide: Style Components Using Lightning Design System Styling Hooks (Beta)

BEM Notation with Double Dashes Is Being Deprecated

The BEM notation with double dashes (--) in Lightning Design System will be deprecated in Summer '21 and replaced by the single underscore notation ().

Why: Double dashes are not supported in XML files that include comments. This notation change was first announced in Salesforce Lightning Design System (SLDS) Release 2.3.1 on May 25, 2017.

How: In Summer '21, all BEM notation with double dashes will no longer be available in SLDS 2.13.0 and later versions. For your styles to continue working with SLDS 2.13.0 and later versions, replace —— with _ in your CSS. For example, replace slds-button-brand with slds-button_brand. If you're using SLDS 2.12.2 and earlier versions, your styles continue to work as no changes have been made to those versions.

If you develop using VSCode, use the SLDS Validator extension to fix the BEM notation in your code. The extension is available as a standalone but also as part of the Salesforce Extension Pack.

Lightning Design System Component Blueprint Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

When: We improve SLDS frequently. For the latest changes, see What's New in the Lightning Design System documentation. That page lists the changes by the date we completed the change. Those changes are rolled up into the next major Salesforce release. The following changes are in Winter '21.

How: Lightning Design System Styling Hooks (beta) provide CSS custom properties that are available for the following component blueprints.

- Accordion
- Alert
- Avatar
- Badges
- Breadcrumbs
- Buttons
- Icons
- Modals
- Pills
- Scoped Tabs
- Tabs
- Toast
- Tooltips

Improve your UI with these recent updates to SLDS component blueprints.

Accordion

Updated heading elements from h3 class="site-text-heading_medium slds-m-top_none" to h2 class="site-text-heading_large".

Badge

Fixed inconsistent heights between variants when a border isn't present.

Combobox

Moved out the assistive text for the listbox of pills from the individual pills to remove repetition for users with screenreaders.

Datetime Picker

 $. \verb|slds-form_compound| is now deprecated and has been replaced by . \verb|slds-form-element_compound|, which is used on the . \verb|slds-form-element| parent.$

Form Element

The compound form now wraps when the width of its parent container is smaller than the combined width of the form elements. This prevents input values from becoming unreadable in compound form elements when the container width is reduced.

Global Navigation

Adjusted the color of unsaved tab indicator asterisk to comply with accessibility color contrast rules.

List Builder

Moved out the assistive text for the listbox of pills from the individual pills to remove repetition for users with screenreaders.

Lookup

Moved out the assistive text for the listbox of pills from the individual pills to remove repetition for users with screenreaders.

Path

The .slds-path scroller class no longer uses role="application".

Pill

Moved out the assistive text for the listbox of pills from the individual pills to remove repetition for users with screenreaders.

Addressed layout inconsistencies for touch styles.

Clarified documentation around linked pill usage.

Added an example for Listbox of Pills in Group.

Progress Indicator

Addressed issue where button icons in progress items were misaligned for mobile/touch.

Progress Ring

Added sizing instructions to ensure a correct ratio.

Radio Button Group

Added aria-describedby="error_01" to the inputs to improve accessibility in the error state.

Tooltip

Updated blueprint examples from anchor links to more semantically correct buttons.

Tree

Added aria-disabled to treeitem elements that are disabled and updated text color to represent disabled state.

Deprecated the usage of .slds-is-disabled in favor of .slds-is-hidden to hide the chevron icon. To represent a disabled state, use aria-disabled instead.

AppExchange Partners: Listing Activity Summary by Region in Marketplace Analytics and Simulation Mode in AppExchange App Analytics

See which locations drive activity using Marketplace Analytics Activity Summary by Region. Test your custom integrations with App Analytics simulation mode.

IN THIS SECTION:

See Which Locations Drive Listing Activity with AppExchange Marketplace Analytics Activity Summary by Region

Use Marketplace Analytics Summary by Region to see how internal and external traffic sources contribute to activity on your AppExchange listing. View your listing's install, lead event, visit, tile hover, and tile view activity by country or by US state or territory.

Test Your Custom Integrations Using AppExchange App Analytics Simulation Mode

To test your custom integrations in a nonproduction environment, enable AppExchange App Analytics simulation mode and receive sample data.

See Which Locations Drive Listing Activity with AppExchange Marketplace Analytics Activity Summary by Region

Use Marketplace Analytics Summary by Region to see how internal and external traffic sources contribute to activity on your AppExchange listing. View your listing's install, lead event, visit, tile hover, and tile view activity by country or by US state or territory.

Who: To use Marketplace Analytics, you need the Manage Listings permission in the Salesforce Partner Community.

Why: To increase visits, installs, and purchases, apply your company's development and marketing resources more effectively.



View data by country on the World Map or by US state or territory on the US Map (1). To change traffic sources or activities, adjust the local filters (2). The gradient shows the range of values for the activity you select (3).

How: In the Salesforce Partner Community, open the Publishing Console, and click Analytics (1) or View Dashboard (2).



SEE ALSO:

Metadata API Settings
AppExchange App Analytics

Test Your Custom Integrations Using AppExchange App Analytics Simulation Mode

To test your custom integrations in a nonproduction environment, enable AppExchange App Analytics simulation mode and receive sample data.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition.

How: To enable AppExchange App Analytics simulation mode, add the Metadata API AppAnalyticsSettings enableSimulationMode org preference to your code.

Change Data Capture: Event Enrichment (Beta) and More Object Support

Enrich your event messages with fields and receive change notifications for more objects.

IN THIS SECTION:

Enrich Change Event Messages with Extra Fields (Beta)

Select fields to always include in change events, even when unchanged, to aid in processing or replicating data. You can select any field whose type is supported, including external ID fields. For example, use enrichment when your app needs an external ID field for matching records in an external system. Enrichment is supported in CometD-based subscribers.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for mortgage lending objects (part of Financial Services Cloud), and warranty term and asset warranty objects (part of Field Service).

Enrich Change Event Messages with Extra Fields (Beta)

Select fields to always include in change events, even when unchanged, to aid in processing or replicating data. You can select any field whose type is supported, including external ID fields. For example, use enrichment when your app needs an external ID field for matching records in an external system. Enrichment is supported in CometD-based subscribers.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.



Note: As a beta feature, Change Data Capture Enrichment is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Change Data Capture Enrichment in the Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

How: You define enrichment fields on a channel and a member of that channel. The channel can be either a custom channel or the ChangeEvents channel. Enriched change events are delivered only on the channel that is configured for enrichment. To add enrichment fields to a channel member and channel, use the PlatformEventChannelMember object in Tooling API or Metadata API.

This example uses Tooling API to enrich the AccountChangeEvent member on the SalesEvents__chn custom channel. The change event is enriched with two fields: a custom field (External_Account_ID__c) and a standard field (Industry). The associated POST request URI is: /services/data/v50.0/tooling/sobjects/PlatformEventChannelMember

Request Body:

SEE ALSO:

Change Data Capture Developer Guide: Enrich Change Events With Extra Fields When Subscribed with CometD (Beta)

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for mortgage lending objects (part of Financial Services Cloud), and warranty term and asset warranty objects (part of Field Service).

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Some objects require specific feature settings and permissions to be enabled.

How: Change Data Capture is available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel.

SEE ALSO:

Change Data Capture Developer Guide: Change Event Object Support

Platform Events: Subscription Management and Usage Monitoring

Manage your Apex trigger subscriptions from the user interface, monitor usage metrics, and track the status of event publishing (beta).

IN THIS SECTION:

Manage Your Platform Event Trigger Subscriptions from the User Interface

You can now suspend and resume Apex trigger subscriptions to a custom platform event through the user interface. Resume a suspended a subscription where it left off, from the earliest available event message, without losing any events published during the suspension.

Monitor Event Publishing and Delivery Usage

To get usage data for event publishing and CometD-client delivery, query the PlatformEventUsageMetric object. Usage data is available for the last 24 hours, ending at the last hour, and for historical daily usage. PlatformEventUsageMetric contains separate usage metrics for high-volume platform events and change data capture events.

Make Apex Callouts After Publishing Platform Event Messages

You can now make Apex callouts after publishing event messages for events configured with the Publish Immediately behavior. Previously, after publishing such events, you couldn't make callouts from any Apex code. Events published immediately have a new limit, which is separate from the Apex DML statement limit.

Get the Status of High-Volume Platform Event Publish Operations (Beta)

High-volume platform events are published asynchronously. With publish status events, you can track the status of publishing operations, and take the necessary actions. Enable status events on the high-volume platform event you are interested in tracking. Then subscribe to the PublishStatusEvent standard platform event.

Manage Your Platform Event Trigger Subscriptions from the User Interface

You can now suspend and resume Apex trigger subscriptions to a custom platform event through the user interface. Resume a suspended a subscription where it left off, from the earliest available event message, without losing any events published during the suspension.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Resume a suspended trigger subscription where it left off. To bypass event messages that are causing errors or are no longer needed, resume the subscription from the tip, starting from new event messages. Previously, you could only deactivate a trigger to suspend the subscription. And when reactivated, the subscription resumed from the tip, missing any unprocessed event messages.

How: To access the platform event detail page, in Setup, enter *Platform Events* in the Quick Find box, click **Platform Events**, and then click the platform event. To manage a trigger subscription, click **Manage** next to the Apex trigger listed under Subscriptions in the platform event detail page.



On the subscription detail page, you can manage the subscription.



After you suspend a subscription, you can resume it.





Note: Subscription management isn't available for flows and processes, but they're still listed in the Subscriptions related list.

Monitor Event Publishing and Delivery Usage

To get usage data for event publishing and CometD-client delivery, query the PlatformEventUsageMetric object. Usage data is available for the last 24 hours, ending at the last hour, and for historical daily usage. PlatformEventUsageMetric contains separate usage metrics for high-volume platform events and change data capture events.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

When: Storage of usage data starts after Winter '21 rolls out. As a result, usage data from before the release isn't available. We recommend that you wait 1 day after the Winter '21 release to start querying usage data. Usage data for the first 24 hours after the release is incomplete due to insufficient data stored to cover the last 24-hour period initially. For example, 1 day after the release, you can get 1 day of usage data. And, 2 days after the release, you can get 2 days of usage data, and so on. Usage data is stored for at least 45 days.

Why: Use PlatformEventUsageMetric to get visibility into your event usage and usage trends. The usage data gives you an idea of how close you are to your allocations and when you need more allocations. The usage metrics stored in PlatformEventUsageMetric are separate from the REST API limits values. Use the REST API limits to track your monthly delivery and publishing usage against your allocations. The monthly CometD-client delivery usage that the limits API returns is common for platform events and change data capture events. PlatformEventUsageMetric breaks down usage of platform events and change data capture events so you can track their usage separately.

How: Dates are stored in Coordinated Universal Time (UTC), so convert your local time to UTC for the query. This query selects usage metrics for the last 24 hours, ending at the last hour. For example, based on the current date and time of August 4, 2020 11:23 in UTC,

the last hour is 11:00. The query returns the usage for the number of platform events delivered to CometD clients for August 3, 2020 at 11:00 to August 4, 2020 at 11:00.

SELECT Name, StartDate, EndDate, Value FROM PlatformEventUsageMetric WHERE Name='PLATFORM_EVENTS_DELIVERED' AND StartDate=2020-08-03T11:00:00.000Z AND EndDate=2020-08-04T11:00:00.000Z

The guery returns this result for the last 24-hour usage.

Name	StartDate	EndDate	Value
PLATFORM_EVENTS_DELIVERED	2020-08-03T11:00:00.000+0000	2020-08-04T11:00:00.000+0000	575

SEE ALSO:

Platform Events Developer Guide: Monitor Platform Event Publishing and Delivery Usage

Make Apex Callouts After Publishing Platform Event Messages

You can now make Apex callouts after publishing event messages for events configured with the Publish Immediately behavior. Previously, after publishing such events, you couldn't make callouts from any Apex code. Events published immediately have a new limit, which is separate from the Apex DML statement limit.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

Why: Events configured with the Publish Immediately behavior are published when the call executes and they don't depend on the successful completion of the transaction. These events are used for tracking and logging purposes. With this change, they aren't considered part of the transaction's DML operations, and therefore no longer prevent Apex callouts from being performed after publishing. They count against a new, separate publishing limit of 150 EventBus.publish() calls. This change doesn't apply to events configured with the Publish After Commit behavior, whose publishing is considered part of the transaction's DML operations. The publishing of these events still counts against the Apex DML statement limit. And you can still make Apex callouts after publishing.

To track the limit usage of EventBus.publish() calls for immediate publishing, use the Limits.getPublishImmediateDML() and Limits.getLimitPublishImmediateDML() Apex methods.



Note: This feature doesn't change the way you make Apex callouts from Apex triggers, which require the <code>@future(callout=true)</code> annotation.

SEE ALSO:

Platform Events Developer Guide: Platform Event Fields
Apex Developer Guide: Execution Governors and Limits
Apex Developer Guide: Invoking Callouts Using Apex

Get the Status of High-Volume Platform Event Publish Operations (Beta)

High-volume platform events are published asynchronously. With publish status events, you can track the status of publishing operations, and take the necessary actions. Enable status events on the high-volume platform event you are interested in tracking. Then subscribe to the PublishStatusEvent standard platform event.



Note: As a beta feature, Publish Status Events is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all,

and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Publish Status Events in the Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: You can get a confirmation of the enqueued publish operation without this feature, but you don't know whether the operation eventually succeeds. A status of success in the immediately returned SaveResult means that the publish operation is queued in Salesforce. The operation is carried out later when system resources are available. Some failures are returned in the SaveResult, such as validation or limit errors, but not the asynchronous errors. In rare cases, enqueued publish operations can fail due to a system error. The benefit of status events is that you can find out about the eventual status of enqueued publish operations and perform appropriate actions.

How: To enable receiving publish status events for your high-volume platform event, in Setup, click **Track publish status** on the event's definition page. Or in Metadata API, set the enablePublishStatusTracking field on CustomObject to true.

Event publish results are batched in a PublishStatusEvent and grouped by the status and topic, which is the event API name. A PublishStatusEvent doesn't necessarily correspond to one publish request. It contains the results of one or more requests that are for the same platform event and have the same publish status. Each PublishStatusEvent includes an array of PublishStatusDetail child objects containing information about each event publish operation.

This example shows the payload for a failed publish status and contains information for two events. The EventUuid field is a universally unique identifier (UUID) that identifies the event message and correlates the publish result of each event with the original publish call.

```
"schema": "tklL37cct1eXnqi yPIS7w",
"payload": {
 "Status": "FAILURE",
 "AdditionalInfo": null,
  "CreatedById": "005xx000001X83aAAC",
  "CreatedDate": "2020-08-06T20:20:23.573Z",
  "PublishStatusDetails": [
   {
      "Replay": null,
      "EventUuid": "e981b488-81f3-4fcc-bd6f-f7033c9d7ac3",
      "FailureReason":
       "The platform event message could not be published. Try again later.",
      "StatusCode": "PLATFORM EVENT PUBLISH FAILED"
    {
     "Replay": null,
     "EventUuid": "ed5773c8-6848-4eee-99cf-2d3703cc0da3",
      "FailureReason":
       "The platform event message could not be published. Try again later.",
      "StatusCode": "PLATFORM EVENT PUBLISH FAILED"
   }
 ],
  "Topic": "Order Event e"
```

Use the EventUuid field value to match the status to the event published. If you published the event in Apex, you can obtain the UUID by calling EventBus.getOperationId (saveResult). If you published the event using Salesforce APIs, the SaveResult

returned contains the UUID in the Error message field. This example contains the save result of an event inserted using a REST API POST request.

```
{
  "id" : "e01xx000000001AAA",
  "success" : true,
  "errors" : [ {
      "statusCode" : "OPERATION_ENQUEUED",
      "message" : "e981b488-81f3-4fcc-bd6f-f7033c9d7ac3",
      "fields" : [ ]
  } ]
}
```

SEE ALSO:

Platform Events Developer Guide: Get the Status of High-Volume Platform Event Publish Operations (Beta)

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

IN THIS SECTION:

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex. Copy products from a cart to a wishlist and work with current carts. Get externally managed accounts. Send survey invitations by email.

API: New and Changed Items

Access more data objects and metadata types in API version 50.0.

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

IN THIS SECTION:

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

New and Changed Aura Components

Build UI easily with these new and changed components.

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

New Components

The following components are new and require API version 50.0 and later.

lightning-rich-text-toolbar-button (Beta)

Adds a custom button to the toolbar of the lightning-input-rich-text component. This component must be nested within lightning-rich-text-toolbar-button-group. For more information, see Add Custom Buttons to the lightning-input-rich-text Base Component (Beta) on page 524.

lightning-rich-text-toolbar-button-group (Beta)

A container for custom buttons in the toolbar of the lightning-input-rich-text component. For more information, see Add Custom Buttons to the lightning-input-rich-text Base Component (Beta) on page 524.

Changed Lightning Web Components

The following components have changed.

lightning-click-to-dial

The following method is new.

• click()—Dials the phone number by passing the parameters and record ld to the phone system if they are provided. Only an enabled phone number can be clicked.

lightning-combobox

The following property is new for the options attribute.

• description—Defines descriptive text for a list item. The descriptive text displays below the label of the list item. When adding descriptions, specify a description for each item in a list. If some items are missing descriptions, the text of the items can be misaligned.

Here's an example using the description property in a component's JavaScript:

lightning-datatable

Columns with the text data type now don't display any content if you pass in an object value.

lightning-input

The input type email has changed.

UTF-8 encoding is supported for entering an international email address.

lightning-input-address

The following attributes are new.

- address-lookup-placeholder—The placeholder for the address lookup field, which is visible only when you use show-address-lookup.
- street-placeholder—The placeholder for the street field.

- city-placeholder—The placeholder for the city field.
- province-placeholder—The placeholder for the province field.
- country-placeholder—The placeholder for the country field.
- postal-code-placeholder—The placeholder for the postal code field.

lightning-input-field

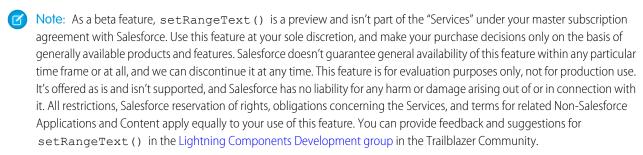
The following field types have changed.

- The picklist field type displays in a disabled and read-only state if you don't provide a controlling field.
- The email field type supports UTF-8 encoding for entering an international email address.
- The name field type supports the suffix field. For more information on enabling this field in your org, see User Fields in Salesforce Help.

lightning-input-rich-text

You can add custom buttons to the toolbar using the components lightning-rich-text-toolbar-button-group and lightning-rich-text-toolbar-button. For more information, see Add Custom Buttons to the lightning-input-rich-text Base Component (Beta) on page 524.

The setRangeText() method (beta) is new.



 setRangeText() —Inserts text in a specified range of index values, replacing content or inserting new content. This method $follows the API of the \verb| HTMLInputElement.setRangeText()| method, and enables you to insert formatted text when the approximation of the approximation of$ you use it with the setFormat() method.

The setFormat () method has changed. You can programmatically set these additional formats: bold, italic, underline, strike, code, code-block, link, color, background, and header. Previously, only align, font, and size were supported.

Apply formats to selected text by calling the method with key-value pairs as parameters. For example:

```
setFormat({bold: true, italic: true, link: "google.com", color: "green", header: 2})
```

lightning-pill-container

When a pill contains an href value, the optional icon or avatar is no longer nested within the hyperlink tag. Clicking the icon or avatar doesn't navigate to the hyperlink. This behavior is consistent with a lightning:pill component that's rendered without lightning:pillContainer.

The bare variant no longer renders pills in an unordered list element. However, the standard and bare variants are visually the same. The bare variant provides a focusable remove button on each pill. Tab to focus on the pill, and tab again to focus on the remove button.

lightning-textarea

The setRangeText() method (beta) is new.



Note: As a beta feature, <code>setRangeText()</code> is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of

generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for setRangeText() in the Lightning Components Development group in the Trailblazer Community.

• setRangeText()—Inserts text in a specified range of index values, replacing content or inserting new content. This method follows the API of the HTMLInputElement.setRangeText() method.

SEE ALSO:

Component Reference

New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

New Module

The following module is now available.

lightning/uiAppsApi

This module includes one wire adapter, getNavItems. Use this wire adapter to get the navigation items (tabs) that the user has access to.

Changed Modules

The following modules have a new wire adapter or JavaScript function.

lightning/uiObjectInfoApi

The getObjectInfos wire adapter is new. Use getObjectInfos to get metadata for multiple objects. The response includes metadata describing fields, child relationships, record type, and theme for each object.

```
import { LightningElement, wire } from 'lwc';
import { getObjectInfos } from 'lightning/uiObjectInfoApi';
import ACCOUNT_OBJECT from '@salesforce/schema/Account';
import OPPORTUNITY_OBJECT from '@salesforce/schema/Opportunity';

export default class GetObjectInfosExample extends LightningElement {
    @wire(getObjectInfos, { objectApiNames: [ ACCOUNT_OBJECT, OPPORTUNITY_OBJECT ] })
    propertyOrFunction;
}
```

lightning/uiRecordApi

The getRecordNotifyChange () function is new. Call getRecordNotifyChange () to refresh the Lightning Data Service cache after you update a record outside of its mechanisms, such as via imperative Apex, Visualforce, or when you call User Interface API via a third-party framework. Lightning Data Service fetches record updates for the record IDs you specify and refreshes your Lightning Data Service cache, providing your wires with the latest record data.

```
import { LightningElement, wire } from 'lwc';
import { getRecord, getRecordNotifyChange } from 'lightning/uiRecordApi';
import apexUpdateRecord from '@salesforce/apex/Controller.apexUpdateRecord';
```

```
export default class NotifyRecordChangeExample extends LightningElement {
    @api recordId;

    // Wire a record.
    @wire(getRecord, { recordId: '$recordId', fields: ... })
    record;

async handler() {
    // Update the record via Apex.
    await apexUpdateRecord(this.recordId);
    // Notify LDS that you've changed the record outside its mechanisms.
    getRecordNotifyChange([{recordId: this.recordId}]);
  }
}
```

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

The following components have changed.

lightning:clickToDial

The following method is new.

• click () — Dials the phone number by passing the parameters and record ld to the phone system if they are provided. Only an enabled phone number can be clicked.

lightning:combobox

The following property is new for the options attribute.

• description—Defines descriptive text for a list item. The descriptive text displays below the label of the list item. When adding descriptions, specify a description for each item in a list. If some items are missing descriptions, the text of the items can be misaligned.

Here's an example using the description property in a component's JavaScript:

lightning:datatable

Columns with the text data type now don't display any content if you pass in an object value.

lightning:input

The input type email has changed.

• UTF-8 encoding is supported for entering an international email address.

lightning:inputAddress

The following attributes are new.

- addressLookupPlaceholder—The placeholder for the address lookup field, which is visible only when you use showAddressLookup.
- streetPlaceholder—The placeholder for the street field.
- cityPlaceholder—The placeholder for the city field.
- provincePlaceholder—The placeholder for the province field.
- countryPlaceholder—The placeholder for the country field.
- postalCodePlaceholder—The placeholder for the postal code field.

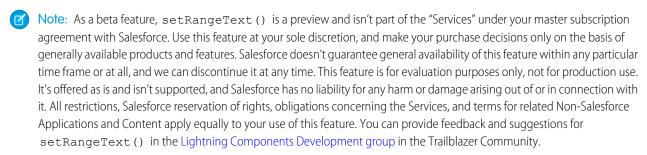
lightning:inputField

The following field types have changed.

- The picklist field type displays in a disabled and read-only state if you don't provide a controlling field.
- The email field type supports UTF-8 encoding for entering an international email address.
- The name field type supports the suffix field. For more information on enabling this field in your org, see User Fields in Salesforce Help.

lightning:inputRichText

The setRangeText() method (beta) is new.



• setRangeText() —Inserts text in a specified range of index values, replacing content or inserting new content. This method follows the API of the HTMLInputElement.setRangeText() method, and enables you to insert formatted text when you use it with the setFormat() method.

The setFormat() method has changed. You can programmatically set these additional formats: bold, italic, underline, strike, code, code-block, link, color, background, and header. Previously, only align, font, and size were supported.

Apply formats to selected text by calling the method with key-value pairs as parameters. For example:

```
setFormat({bold: true, italic: true, link: "google.com", color: "green", header: 2})
```

lightning:pillContainer

When a pill contains an href value, the optional icon or avatar is no longer nested within the hyperlink tag. Clicking the icon or avatar doesn't navigate to the hyperlink. This behavior is consistent with a lightning:pill component that's rendered without lightning:pillContainer.

The bare variant no longer renders pills in an unordered list element. However, the standard and bare variants are visually the same. The bare variant provides a focusable remove button on each pill. Tab to focus on the pill, and tab again to focus on the remove button.

lightning:textarea

The setRangeText() method (beta) is new.

Note: As a beta feature, setRangeText() is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of

generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for setRangeText() in the Lightning Components Development group in the Trailblazer Community.

• setRangeText()—Inserts text in a specified range of index values, replacing content or inserting new content. This method follows the API of the HTMLInputElement.setRangeText() method.

SEE ALSO:

Component Reference

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information, refer to the Apex Developer Guide.

IN THIS SECTION:

Cache Namespace

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

LxScheduler Namespace

The new LxScheduler namespace has these classes and methods, and an interface.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

Apex: New Features

Cache Namespace

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Get the average item size among all the keys retrieved from the cache

Use the new getAvgGetSize() method in the Cache.Org, Cache.Partition, and the Cache.Session classes.

Get the maximum item size among all the keys retrieved from the cache

Use the new getMaxGetSize() method in the Cache.Org, Cache.Partition, and the Cache.Session classes.

DEPRECATED: Methods getAvgValueSize() and getMaxValueSize() in Cache.Org, Cache.Partition, and Cache.Session

The getAvgValueSize() and the getMaxValueSize() methods in the Cache.Org, Cache.Partition, and the Cache.Session classes are not supported in version 50.0 and later.

LxScheduler Namespace

The new LxScheduler namespace has these classes and methods, and an interface.

New Classes

Get a list of parameters that are passed to the LxScheduler.ServiceResourceScheduleHandler interface

Use these methods in the new LxScheduler.ServiceAppointmentRequestInfo class. Use the getPrimaryResourceId method to get the ID of the primary service resource. Use the getServiceResources method to get a list of service resources for the time slots that are already booked. Use the getWorkTypeId method to get the ID of the appointment's work type.

Get information about a service resource

Use these methods in the new LxScheduler.ServiceResourceInfo class. Use the getResourceType method to get the type of the service resource, such as Technician or Asset. Use the getServiceResourceId method to get the ID of the service resource. Use the getTerritoryIds method to get a list of requested service territories for the service resource. Use the getUserName method to get the username of the service resource.

Pass results from your custom Apex class to the LxScheduler. ServiceResourceScheduleHandler interface methods

Use the LxScheduler.ServiceResourceSchedule class.

Pass the list of unavailable time slots for requested service resources to the LxScheduler. ServiceResourceSchedule class

Use the LxScheduler.UnavailableTimeslot class.

New Interface

Allow an implementing class to check service resources' external calendar events and return the time slots where service resources are booked

Use the new LxScheduler.ServiceResourceScheduleHandler interface.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Detect current Apex context at runtime with Request ID and Quiddity

Use these new methods in the System. Request class. Use the getCurrent() method to retrieve the Request object that contains the unique identifier for the current Salesforce request and the Quiddity value. Use the getRequestId() method to get the current request ID. Use the getQuiddity() method to get the Quiddity value.

New or Changed Methods in Existing Classes

Enhance security with a new threading behavior for Email-to-Case

Use the getCaseIdFromEmailHeaders method in the System. Cases class to match incoming emails with their header information. The Cases.getCaseIdFromEmailThreadId() method is deprecated.

Check limit usage of platform event immediate publishes

Use the new getPublishImmediateDML method in the System.Limits class to get the number of EventBus.publish calls made for platform events configured to publish immediately. And use the new

getLimitPublishImmediateDML method in the System.Limits class to get the maximum limit of EventBus.publish calls.

Dynamically add errors to an SObject field

Use the addError overload methods in the System. SObject class:

- addError(String fieldName, String message[, Boolean doNotEscape])
- addError(Schema.SObjectField field, String message[, Boolean doNotEscape])

Know if an SObject instance contains errors

Use the hasErrors method in the System. SObject class.

Get the error details for an SObject instance

Use the getErrors method in the System. SObject class.

Get metadata description for a specified list of SObject types

Use the describeSObjects overload method in the System. Schema class. The default describe option for this method is SObjectDescribeOptions. DEFERRED, which indicates lazy-load child relationships.

Get the short code for the Quiddity value of the current Salesforce request

Use the getQuiddityShortCode method in the System.System class.

New Enums

Use Elliptical Curve Digital Signature Algorithms (ECDSA) with Crypto methods

Use the new ECDSA-SHA256, ECDSA-SHA384, and ECDSA-SHA512 values in the algorithmName parameter in Crypto.sign, Crypto.signWithCertificate, Crypto.signXML(), and Crypto.verify() (methods) in the System.Crypto class.

Specify a quiddity value used by the methods in the System. Request class

Use the new System. Quiddity enum.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex. Copy products from a cart to a wishlist and work with current carts. Get externally managed accounts. Send survey invitations by email.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the ConnectApi namespace. These methods use other ConnectApi classes to input and return information. We refer to the ConnectApi namespace as Connect in Apex.

IN THIS SECTION:

New and Changed Connect in Apex Classes

These classes are new or have changes.

New and Changed Connect in Apex Input Classes

These input classes are new or have changes.

New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

New and Changed Connect in Apex Enums

These enums are new or have changes.

SEE ALSO:

Connect REST API

Apex Developer Guide: ConnectApi Namespace

Connect REST API Developer Guide

New and Changed Connect in Apex Classes

These classes are new or have changes.

B2B Commerce on Lightning

These new and changed methods are in the ConnectApi.CommerceCart class.

Copy the products from a cart to a wishlist

 copyCartToWishlist(webstoreId, effectiveAccountId, activeCartOrId, cartToWishlistInput)

Set the visibility for cart messages

 setCartMessagesVisibility(webstoreId, activeCartOrId, effectiveAccountId, messageVisibility)

All methods with the activeCartOrId parameter now support the current value

The current value indicates a cart with a status that isn't Closed or PendingDelete.

- addItemsToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItems)
- addItemToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItemInput)
- copyCartToWishlist(webstoreId, effectiveAccountId, activeCartOrId, cartToWishlistInput)
- deleteCart(webstoreId, effectiveAccountId, activeCartOrId)
- deleteCartItem(webstoreId, effectiveAccountId, activeCartOrId, cartItemId)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, sortParam)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, pageSize)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, pageSize, sortParam)
- getCartItems(webstoreId, effectiveAccountId, activeCartOrId, productFields, pageParam, pageSize, sortParam)
- getCartSummary(webstoreId, effectiveAccountId, activeCartOrId)
- getOrCreateActiveCartSummary(webstoreId, effectiveAccountId, activeCartOrId)
- setCartMessagesVisibility(webstoreId, activeCartOrId, effectiveAccountId, messageVisibility)
- updateCartItem(webstoreId, effectiveAccountId, activeCartOrId, cartItemId, cartItem)

These new methods are in the ConnectApi.CommerceWishlist class.

Update the name of a wishlist

- updateWishlist(webstoreId, wishlistId, wishlistUpdateInput)
- updateWishlist(webstoreId, effectiveAccountId, wishlistId, wishlistUpdateInput)

CMS Managed Content

These new methods are in the ConnectApi.ManagedContent class.

Get all managed content versions for a channel with absolute URLs

• getAllContent(channelId, pageParam, pageSize, language, managedContentType, includeMetadata, startDate, endDate, showAbsoluteUrl)

Get all managed content versions for a community with absolute URLs

 getAllManagedContent(communityId, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)

Get managed content versions for a channel with absolute URLs using a list of managed content IDs

 getContentByIds(channelId, managedContentIds, pageParam, pageSize, language, managedContentType, includeMetadata, startDate, endDate, showAbsoluteUrl)

Get managed content versions for a community with absolute URLs using a list of managed content IDs

 getManagedContentByIds(communityId, managedContentIds, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)

Get managed content versions with absolute URLs using a list of content topic names

 getManagedContentByTopics(communityId, topics, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)

Get managed content versions with absolute URLs using a list of managed content IDs and content topic names

 getManagedContentByTopicsAndIds(communityId, managedContentIds, topics, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)

Commerce Payments

These new methods are in the ConnectApi. Payments class.

Refund a payment

refund(ReferencedRefundInput, paymentId)

Capture a payment

capture(AuthCaptureInput, authorizationId)

External Managed Account

This new method is in the ConnectApi.ExternalManagedAccount class.

Get externally managed accounts available to the context user across all communities

getCommunitiesExternalManagedAccounts (communityId)

Salesforce Surveys

This new method is in the ConnectApi. Surveys class.

Send survey invitations by email

sendSurveyInvitationEmail(surveyID, SurveyEmailInput)

New and Changed Connect in Apex Input Classes

These input classes are new or have changes.

B2B Commerce on Lightning

ConnectApi.CartMessagesVisibilityInput

This new input class has this property.

• visibility—Specifies whether to set cart messages as visible (true) or not (false).

ConnectApi.CartToWishlistInput

This new input class has this property.

• wishlistId—ID of the wishlist to copy cart products to.

ConnectApi.WishlistUpdateInput

This new input class has this property.

name—Wishlist name to update.

Commerce Payments

ConnectApi.AuditParamsRequest

This new abstract input class is a super class of ConnectApi.BaseRequest and has these properties.

- email—Email of the client that initiated the request.
- ipAddress—Client IP address that made the request.
- macAddress—Client Mac address that made the request.
- phone—Phone number of the client that initiated the request.

ConnectApi.CaptureRequest

This new input class is a subclass of ConnectApi. BaseRequest and has these properties.

- accountId—ID of the account that must be linked to the capture request.
- amount—Amount that must be captured from the previous authorization.
- clientContext—Provides context for payment APIs. Used for a payment caller to reestablish context.
- comments—Comments for payment capture.
- effectiveDate—The date that the payment becomes effective.
- paymentGroup—Payment group details associated with the payment request.

ConnectApi.BaseRequest

This new input class is a subclass of ConnectApi.AuditParamsRequest and a super class of ConnectApi.CaptureRequest and ConnectApi.RefundRequest.It has these properties.

- additionalData—Additional information about the gateway call. Will vary based on the type of payment gateway.
- idempotencyKey—Idempotency key used for the payment request. Can be provided in the payload or the header, but not in both places at once.

ConnectApi.PaymentGroupRequest

This new input class has these properties.

- createPaymentGroup—Flag to indicate if payment group needs to be created.
- currencyIsoCode—Three-letter ISO 4217 currency code associated with the payment group record.
- id—If ID has a value, the payment capture is using an active PaymentGroup. If ID is null and other pproperties have values, the payment capture will create a payment group. If a payment group ID exists, currencyIsoCode and sourceObjectId properties must be null, and createPaymentGroup can be absent or false.
- sourceObjectId—Order object ID for linking an order to a payment group. Provide an existing OrderId.

ConnectApi.ReferencedRefundRequest

This new input class is a subclass of ConnectApi. RefundRequest and has these properties.

- accountId—ID of the account which must be linked to the referenced refund request.
- amount—Amount that must be refunded.
- clientContext—Provides context for payment APIs. Used for a payment caller to reestablish context.
- comments—Comments for the refund.
- effectiveDate—Date that the refund becomes effective.
- paymentGroup—Payment group details associated with the refund request.

ConnectApi.RefundRequest

This new abstract input class is a subclass of ConnectApi.BaseRequest and a super class of ConnectApi.ReferencedRefundRequest. It doesn't have any additional properties.

Salesforce Order Management

ConnectApi.OrderSummaryInputRepresentation

This input class has these new properties.

- name—OrderNumber to assign to the OrderSummary.
- status—Status to assign to the OrderSummary.

Salesforce Surveys

ConnectApi.AssociateRecordsWithRecipientInput

This new input class has these properties.

- associateRecordIds—ID of the associated records.
- recipientId—Participant ID with whose invitation the record should be associated.

ConnectApi.RecipientEngagementContextInput

This new input class has these properties.

- recipientEngagementContext—Map of additional parameters that are associated with the generated invitation for the recipient.
- recipientId—ID of the recipient.

ConnectApi.SurveyInvitationEmailInput

This new input class has these properties.

- allowGuestUserResponse—Allows participants who don't have a Salesforce account to respond.
- allowParticipantsAccessTheirResponse—Allows participants to view their responses after they submit the survey.

- associateRecordsWithRecipients—Maps each recipient with another record that must be associated with the recipient's survey invitation.
- body—Content of the email. Specify the email body in case you don't specify an email template.
- collectAnonymousResponse—Allows participants to respond anonymously.
- communityId—ID of the community that's used to open the survey for users outside your org.
- emailTemplateId—ID of the email template that's used to send the survey invitation.
- fromEmailAddress—Email ID of the user or the org-wide email address associated with the user's profile.
- invitationExpirationDate—Date on which the survey invitation expires.
- invitationOwner—ID of the owner of the survey invitation records.
- isPersonalInvitation—Creates an unique invitation for each participant. When a participant responds using a personal invitation, the response record is associated with the participant's Salesforce record.
- recipientEngagementContexts—Maps each recipient with the context based on which the survey invitation is emailed.
- recipients—List of up to 300 IDs of leads, contacts, or users to whom the survey invitation is emailed.
- shareInvitationsWith—ID of the user with whom the survey invitation records must be shared. The invitation records are shared with Read access.
- subject—Subject of the email. Specify the subject in case you don't specify an email template.
- surveyQuestionIds—ID of the question that's embedded in the email.

New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

B2B Commerce with Lightning

ConnectApi.CartItem

This output class has these new properties.

- totalAdjustmentAmount—Total adjustment amount for the item.
- unitAdjustedPrice—Unit price, including adjustments, for the item.
- unitAdjustmentAmount—Adjustments made to the unit price for the item.

ConnectApi.CartMessagesSummary

This output class has this new property.

• totalLineItemsWithErrors—In ConnectApi.CartItemResult, either null if the cart item has no errors or 1 if the cart item has errors. In ConnectApi.CartSummary, the total number of product line items that contain errors.

ConnectApi.CartMessagesVisibilityResult

This new output class has this property.

• visibility—Specifies whether cart messages are set to visible (true) or not (false).

ConnectApi.CartProductAttribute (Pilot)

Note: We provide product variations and attributes to selected customers through a pilot program that requires agreement to specific terms and conditions. Product variations and attributes are subject to change and aren't generally available unless or until Salesforce announces their general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

This new output class has these properties.

- label—Label or display name of the attribute
- sequence—Sequence of the attribute within the attribute set.
- value—Display value of the attribute.

ConnectApi.CartProductSummary

This output class has this new property.

• variationAttributes (pilot) — Variation attributes associated with the product.

ConnectApi.CartSummary

This output class has these new and changed properties.

- purchaseOrderNumber—Purchase order for the cart.
- status—This property now supports the pendingDelete value.

ConnectApi.CartToWishlistResult

This new output class has these properties.

- productsAddedCount—Number of products copied from the cart to the wishlist.
- wishlistId—ID of the wishlist that cart products were copied to.

ConnectApi.ProductAttributeInfo (Pilot)

This new output class has these properties.

- allowableValues—Allowable values for the attribute.
- apiName—API name of the attribute.
- availableValues—Attribute values that are available for product.
- fieldEnumOrId—Field ID for custom fields or enumeration value for standard fields.
- label—Label of the attribute.
- objectName—Name of the object that contains the field.
- sequence—Sequence of the attribute in the attribute set.

ConnectApi.ProductAttributeSelectionInfo(Pilot)

This new output class has these properties.

- apiName—API name of the attribute.
- label—Label of the attribute.
- sequence—Sequence of the attribute in the attribute set.
- value—Display value of the attribute.

ConnectApi.ProductAttributeSet (Pilot)

This new output class has these properties.

- attributes—Map of the attributes that are members of the attribute set.
- developerName—Name of the attribute set.
- id—ID of the product attribute record that represents the product attribute set.

ConnectApi.ProductAttributeSetInfo(Pilot)

This new output class has these properties.

- attributeInfo—Map of the API name of the attribute field to the attribute metadata.
- description—Description of the attribute set.
- developerName—Developer name of the attribute set.

- id—ID of the attribute set.
- masterLabel—Master label of the attribute set.
- sequence—Sequence of the attribute set with regards to the product.

ConnectApi.ProductAttributesToProductEntry(Pilot)

This new output class has these properties.

- canonicalKey—Attribute API values concatenated using (_) based on the sequence number of the attributes in the attribute set.
- productId—Variation product ID for the selection of attributes.
- selectedAttributes—Ordered list of attribute values and metadata that can be used to form a key that maps to product ID

ConnectApi.ProductDetail

This output class has these new properties.

- attributeSetInfo (pilot)—Map of the attribute set developer name to its metadata.
- productClass (pilot)—Class of product. Values are:
 - Simple
 - Variation
 - VariationParent
- variationAttributeSet (pilot)—Variation attribute set associated with the product.
- variationInfo (pilot)—Available and allowable values for variation attributes and a map to resolve variation product IDs from attribute value combinations.
- variationParentId (pilot)—ID of the variation parent.

ConnectApi.ProductVariationInfo (Pilot)

This new output class has these properties.

- attributesToProductMappings—Map of attribute value combinations to variation product ID.
- variantAttributeInfo—Map of field API name to product attribute information.

CMS Managed Content

ConnectApi.ManagedContentChannel

This output class has these new and changed properties.

- channelType—This property now supports the PublicUnauthenticated value.
- domainId—ID of the domain assigned to the channel.
- domainName—Name of the domain assigned to the channel.
- isDomainLocked—Specifies whether the domain is locked and can't be changed (true) or not (false).

ConnectApi.ManagedContentVersion

This output class has this new property.

unauthenticatedUrl—Unauthenticated delivery URL.

Commerce Payments

ConnectApi.AbstractGatewayCommonResponse

 $This new \ abstract \ output \ class \ is \ a \ super \ class \ of \ Connect \ Abstract \ Gateway \ Response \ and \ has \ these \ properties.$

- gatewayAvsCode—Used to verify the address mapped to a payment method when the payments platform requests tokenization from the payment gateway.
- gatewayDate—The date that the notification occurred. Some gateways don't send this value.
- gatewayMessage—Error messages that the gateway returned for the notification request. Maximum length of 255 characters.
- gatewayResultCode—Gateway-specific result code. You can map the result code to a Salesforce-specific result code. Maximum length of 64 characters.
- gatewayResultCodeDescription—A description of the gateway-specific result code that a payment gateway returned. Maximum length of 1,000 characters.
- salesforceResultCode—The Salesforce result code for the gateway result code.

ConnectApi.AbstractGatewayResponse

This new abstract output class is a subclass of ConnectApi. AbstractGatewayCommonResponse and a super class of ConnectApi. CaptureGatewayResponse and ConnectApi. RefundGatewayResponse. It has these properties.

- gatewayReferenceDetails—Provides information about the gateway communication.
- gatewayReferenceNumber—Unique transaction ID created by the payment gateway.

ConnectApi.CaptureGatewayResponse

This new output class is a subclass of ConnectApi. AbstractGatewayResponse and has no additional properties.

ConnectApi.CaptureResponse

This new output class has these properties.

- error—Error response representation for an authorization capture.
- gatewayResponse—Gateway log response containing details about gateway logs created during the process of the capture request.
- payment—Payment response object for the capture request. Contains the information related to a payment object created during request processing.
- paymentGatewayLogs—Gateway log collection for an authorization capture.
- paymentGroup—Payment group associated with the capture request.

ConnectApi.GatewayLogResponse

This new output class has these properties.

- createdDate—Date indicating when the gateway log was created.
- gatewayResultCode—The gateway sends result codes to show the status of a transaction as it is passed to the financial institution and then returned to the client.
- id—ID of the gateway log record.
- interactionStatus—Gateway interaction status. Current supported values are SUCCESS, FAILED, or TIMEOUT.

ConnectApi.PaymentGroupResponse

This new output class has these properties.

- currencyIsoCode—Three-letter ISO 4217 currency code associated with the payment group record.
- id—ID of the payment group record.
- sourceObjectId—Source object ID of the payment group record. Supports only OrderId.

ConnectApi.PaymentResponse

This new output class has these properties.

- accountId—ID of the account related the payment record.
- amount—Total amount of the payment transaction performed in the payment request.

- currencyIsoCode—Three-letter ISO 4217 currency code associated with the payment output.
- effectiveDate—Date that the payment becomes effective.
- id—ID of the payment record.
- paymentNumber—Number of the payment record created as a result of the request processing.
- requestDate—Date when the payment transaction occurred.
- status—Status of the new payment entity record.

ConnectApi.ReferencedRefundResponse

This new output class has these properties.

- error—Error response representation for the refund.
- gatewayResponse—Gateway response received for the processed refund request.
- paymentGatewayLogs—Gateway log collection representation for the refund.
- paymentGroup—Payment group associated with the refund.
- refund—Refund response representation.

ConnectApi.RefundGatewayResponse

This new output class is a subclass of ConnectApi. AbstractGatewayResponse and has no additional properties.

ConnectApi.RefundResponse

This new output class has these properties.

- accountId—ID of the account related to the refund record.
- amount—Total amount of the refund transaction performed in the payment request.
- currencyIsoCode— Three-letter ISO 4217 currency code associated with the payment group record.
- effectiveDate—Date that the refund becomes effective.
- id—ID of the refund record.
- refundNumber—Number of the refund record that was created as a result of the request processing.
- requestDate—Date when the refund occurred.
- status— Indicates the results of processing the refund transaction in the gateway.

Managed Topics

ConnectApi.TopicImages

This output class has these changed properties.

- coverImageUrl—Featured and navigational topic images uploaded in version 50.0 are stored as asset files. Images uploaded in version 49.0 and earlier are stored as documents. This storage change results in a URL change.
- featuredImageUrl—Featured and navigational topic images uploaded in version 50.0 are stored as asset files. Images uploaded in version 49.0 and earlier are stored as documents. This storage change results in a URL change.

Personalization

ConnectApi.FormulaScope

This new output class has these properties.

- contextValues—Map of context values for the scope.
- fields—List of fields of the scope.
- formula—Formula of the scope.

ConnectApi.Target

This output class has these new and changed properties.

- formulaScope—Formula scope of the target.
- scope—This property isn't returned in version 50.0 and later. Instead, formulaScope returns this information.

Salesforce Surveys

ConnectApi.SurveyInvitationEmailOutput

This new output class has these properties.

- errorcode—Error code for the failed call.
- errorMessage—Details explaining why the call failed.
- status—Status of the call. Possible values are: Queued, Failed.

New and Changed Connect in Apex Enums

These enums are new or have changes.

For information about these enums, see ConnectApi Enums in the Apex Developer Guide.

ConnectApi.CartStatus

This enum has this new value.

• PendingDelete—Cart is pending delete, for example, a user deleted the cart but the job hasn't completed yet.

ConnectApi.ManagedContentChannelType

This enum has this new value.

• PublicUnauthenticated

ConnectApi.ProductClass (Pilot)

This new enum has these values.

- Simple
- Variation
- VariationParent

ConnectApi.SurveyEmailStatus

This new enum has these values.

- Failed
- Queued

API: New and Changed Items

Access more data objects and metadata types in API version 50.0.

IN THIS SECTION:

New and Changed Objects

Access more data through these new and changed standard objects.

New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

REST API

REST API includes changed resources.

SOAP API

SOAP API includes changed headers and changes to some data types.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Copy products from a cart to a wishlist and work with current carts. Get externally managed accounts. Get the body of a quick text. Send survey invitations by email.

Einstein Analytics REST API

Create, update, and retrieve auto-install requests for embedded apps using the Einstein Analytics REST API. Query replicated datasets by category and create new Salesforce datasets. Get detailed node data for individual dataflow jobs.

User Interface API

Work with related lists, use lightweight resources to get default values to create and clone records, and enjoy using more objects with User Interface API.

Bulk API 2.0

These calls are changed in API version 50.0.

Tooling API New and Changed Objects

Tooling API includes new and changed objects.

Metadata API

Metadata API includes new and changed types and fields.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

REMOVED: The DeleteEvent object was removed

We removed the DeleteEvent object from the Search API and it is no longer supported with SOSL. This object was used to search the Recycle Bin in Lightning Experience. For more information, see Search Capability Removed from the Recycle Bin on page 104.

Add a custom theme color to in-app guidance

Use the ${\tt themeColor} \ and \ {\tt themeSaturation} \ fields \ of the \ Prompt Version \ object.$

Get info on associated objects

Use the associateEntityType and associateParentEntity properties.

Einstein Analytics

View Einstein Analytics Data Downloads in Your Event Log Files

Use the new WAVE_DOWNLOAD_EVENT type fields on the EventLogFile object.

DEPRECATED: Field was deprecated in the Wave Performance Event Type object.

The QUERY_ID field is deprecated from the Wave Performance Event Type object in API version 50.0.

Commerce

Get the suspension status of an order summary

Use the new IsSuspended field on the existing OrderSummary object.

Get the active process exception count on an order summary

Use the new ActiveProcessExceptionCount field on the existing OrderSummary object.

Identify, troubleshoot, and resolve order processing failures

Use the new ProcessException object.

Trigger actions when ProcessException objects are created

Use the new ProcessExceptionEvent object.

Get info on rules for sharing a ProcessException object with users other than the owner

Use the new ProcessExceptionSharingRule object.

Get info on the list of access levels to a ProcessException record

Use the new ProcessExceptionShare object.

Manage end-to-end processing for a return order

Use the new OrderSummaryId, StatusCategory, ExpirationDate, TaxLocaleType, and LifeCycleType fields on the existing ReturnOrder object.

Get product, delivery, price adjustment, and tax amounts for a return order

Use the new TotalProductAmount, TotalProductTaxAmount, TotalDeliveryAmount, TotalDeliveryTaxAmount, TotalProductAdjustAmount, TotalProductAdjustTaxAmount, TotalDeliveryAdjustTaxAmount, TotalAmount, TotalProductAmtWithTax, TotalProductAmtWithTax, TotalProductAmtWithTax, TotalDeliveryAmtWithTax, TotalProductAdjustAmtWithTax, TotalDeliveryAdjustAmtWithTax, and GrandTotalAmount on the existing ReturnOrder object.

Manage end-to-end processing for a return order line item

Use the new OrderItemSummaryId, ChangeOrderItemId, Type, TypeCode, QuantityExpected, QuantityReceived, QuantityRejected, ReasonForRejection, UnitPrice, and GrossUnitPrice on the existing ReturnOrderLineItem object.

Get price adjustment and tax amounts for a return order line item

Use the new TotalLineAmount, TotalLineTaxAmount, TotalAdjustmentTaxAmount, TotalAdjustmentAmount, TotalLineAmountWithTax, TotalAdjustmentAmountWithTax, TotalPrice, TotalTaxAmount, and TotalAmount on the existing ReturnOrderLineItem object.

Get price adjustments on a return order item

Use the new ReturnOrderItemAdjustment object.

Get tax amounts on a return order item

Use the new ReturnOrderItemTax object.

CommercePayments

Allow integrators and payment providers to choose an active payment to receive an order's payment data

Use the new GtwyProvPaymentMethodType object.

Communities

Store navigational and featured topic images as asset files

 $Use the {\tt new LargeLogoAssetId} \ and {\tt MediumLogoAssetId} \ values of the {\tt AssetCategory} \ field of the {\tt CustomBrandAsset} \ object.$

Include navigation menu tile item images, the background color of the login button, and the image URL that appears as the background on the community's login page in your branding

Use the LogoAssetId, LoginPrimaryColor, and LoginBackgroundImageUrl values of the AssetCategory field of the CustomBrandAsset object.

These values were previously incorrectly documented or missing from documentation.

Get the discount or surcharge and the count per quantity unit

Use the new UnitAdjustedPrice and the UnitAdjustmentAmount fields on the CartItem object.

Get variation-related information about a product

Use the new ProductClass and Type fields on the Product2 object.

Get the total error count on cart line items

Use the new TotalLineItemsWithErrors field on the WebCart object.

Set time to live values for your B2B checkout

Use the new CheckoutTimeToLive and CheckoutValidAfterDate fields on the WebStore object.

Track changes to external account hierarchies

Use the new ExternalAccountHierarchyHistory object.

Allow external users to manage and buy on behalf of other external account users

Use the new AccessManageUser and AccessBuyFor fields on the DelegatedAccount object.

REMOVED: We removed the search () attribute from the Wishlist object

Searches in B2B stores no longer return results from lists.

Create relationships between ManagedContentInfoand ProductMedia in Salesforce CMS

Use the new ManagedContentInfo object.

These values were previously incorrectly documented or missing from documentation.

Customization

Specify the API version of a flow definition

Use the ApiVersion field on the FlowVersionView object.

Specify the API version for running a flow.

Use the ApiVersionRuntime field on the FlowVersionView object. For more information, see Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience on page 451.

Understand the Custom Permissions License Required Option

If you use Salesforce managed packages, the IsLicensed field on the CustomPermission object indicates if the custom permission requires Salesforce licenses.

Get More Information About Tabs

On the TabDefinition object, use the IsAvailableInDesktop and IsAvailableInMobile fields to determine what form factor your tab is available in. The MobileUrl field contains the URL that can be used to launch this tab in the Salesforce mobile app. Introduced in API version 45.0, these three fields have been added to the SOAP API Developer Guide.

Query Credentials with JSON Web Tokens

Use the following fields on the NamedCredential object. Introduced in API version 46.0, these six fields have been added to the SOAP API Developer Guide.

- AuthTokenEndpointUrl
- JwtAudience
- JwtFormulaSubject

- JwtIssuer
- JwtTextSubject
- JwtValidityPeriodSeconds

Manage the languages available for translation

Use the new Translation object to query and update the languages available for translation.

Get information about the labels used for screen flows in your custom report

Use the new FlowLabel field on the FlowInterviewLog object, and the ElementLabel field on the FlowInterviewLogEntry object.

DEPRECATED: User permission for viewing flow usage and flow event data

The PermissionsViewFlowUsageAndFlowEventData field has been deprecated from the Profile object.

Development

BEHAVIOR CHANGE: The DownloadSize field type on the AppAnalyticsQueryRequest object changed from int to long

The range of possible values for DownloadSize exceeds the maximum supported by int. Update your AppExchange App Analytics custom integrations that use DownloadSize to allow for values of type long.

Monitor Platform Event Publishing and Delivery Usage

Query the new PlatformEventUsageMetric object to get platform event and change data capture event usage data. Usage data is available for the last 24 hours and daily values.

REMOVED: The HeaderFields field on the AppAnalyticsQueryRequest object was removed

We removed this field from the Winter '21 release as we make improvements.

Capture the shape (features, settings, limits, and licenses) of an org. Then use it to create scratch orgs that look like it.

Use the ShapeRepresentation object. You can only have one record in Active status in an org.

Specify an org whose shape (features, settings, limits, and licenses) you want to use to create scratch orgs.

Use the new SourceOrg field on the ScratchOrgInfo object. The source org must be a production org.

Lightning Scheduler

Associate a custom Apex class with a scheduling policy to check external calendars for service resource availability

Use the new ExtCalEventHandlerId field on the AppointmentSchedulingPolicy object.

Define appointment time slots that are longer than an hour

Use the new values in the AppointmentStartTimeInterval field on the AppointmentSchedulingPolicy object.

Sales

In the opportunities list view and Kanban view, show the amounts and close dates that have recently changed

On the Opportunity object, use the new LastAmountChangedHistoryId and LastCloseDateChangedHistoryId fields.

On the Opportunity History object, use the new PrevAmount and PrevCloseDate fields.

Learn about opportunity scoring model factors that are based on multiple fields

On the Sales AlScore Model Factor object, use the new Secondary Source Field Value and Secondary Source Field Value Text fields.

Track more information about email templates

On the EmailTemplate object, use the new HasSalesforceFiles and IsBuilderContent fields.

See when a task was marked Closed.

Use the CompletedDateTimefield on the Task object. Introduced in API version 49.0, this field has been added to the Object Reference for Salesforce and Lightning Platform.

Know more about when a List Email is scheduled.

Use the ScheduledDate field on the ListEmail object. This field can now be created and updated.

Learn which sales cadences are paused

Use the new Paused picklist values on the State fields on the ActionCadenceStepTracker and the ActionCadenceTracker objects. Also use new WasEverPaused field on the ActionCadenceStepTracker object.

See which user completed a sales cadence, even if the sales cadence has been assigned to multiple users

Use the new CompletedById field on the ActionCadenceStepTracker object.

See which sales cadence step trackers are being updated by Salesforce, so you can filter them out from your lists

Use the new Processing picklist value on the State field on the ActionCadenceTracker object. For example, if you change the ownership of many action cadence trackers at once, it takes Salesforce a few moments to make the updates.

Easily find the active sales cadence step trackers

Use the new IsTrackerActive field on the ActionCadenceTracker object. IsTrackerActive is true if the sales cadence step tracker has the state Running, Paused, Processing, or Initializing.

Learn even more about the emails sent by your sales cadence steps, so you can better plan your high velocity sales strategy

Use the following fields on the ActionCadenceStep object:

- AllEmailsHardBouncedCount
- UniqueEmailsOpenedCount
- UniqueEmailsRepliedCount
- UniqueEmailsLinkClickedCount
- AllEmailsLinkClickedCount
- AllEmailsRepliedCount
- AllEmailsSoftBouncedCount
- AllEmailsOutOfOfficeCount

Create and edit Email Content records.

Use the new EmailContent object available for Pardot orgs.

Identify the EmailContentID for List Emails.

Use the EmailContentID field on the ListEmail object. This field is only available for Pardot orgs.

Salesforce Surveys

Name field is not editable

The Name field of the Survey object is read-only.

Create template surveys

Use the new IsTemplate field on the SurveyVersion object.

Associate Public Sector Cloud records with survey invitations and responses

Use the new Individual Application picklist value on the SubjectEntityType field in the SurveySubject object.

Security and Identity

Store the ID of changed email address verification email templates

On the Network object, use the ChgEmailVerNewEmailTemplateId and ChgEmailVerOldEmailTemplateId fields.

Track changes on the UserDevice object to keep your org secure

Use the new UserDeviceHistory object to track changes on the UserDevice object.

Store device identification information to manage your users' access

On the UserDevice object, use the UserProvidedDeviceIdentifier field to store an identifier for the user's device, like the International Mobile Equipment Identity (IMEI) number or the device serial number.

Record new approval statuses for a user's mobile device

On the UserDevice and UserDeviceApplication objects, use the new Approved and Pending Approval values on the Status field.

REMOVED: Values were removed from the UserDevice and UserDeviceHistory objects

The Active and New values are no longer available on the Status field.

You're no longer required to specify how and when consent is captured for multiple objects

Use the new Nillable value on the ConsentCapturedSource and ConsentCapturedDateTime fields on the AuthorizationFormConsent and CommSubscriptionConsent objects. You can also use the new Nillable value on the CaptureDate, CaptureContactPointType, and CaptureSource fields on the ContactPointConsent, ContactPointTypeConsent, and PartyConsent objects.

You're no longer required to specify the type of tool used to capture consent for an object

Use the new Nillable value on the ConsentCapturedSourceType field on the AuthorizationFormConsent object.

Track policies that anonymize or transfer personal data from your org at your customer's request

Use the new DsarPolicy object, which supports Data Subject Access Request policies created in the Privacy Center managed package.

Get a log of customer requests to anonymize or transfer their personal data

Use the new DsarPolicyLog object, which supports Data Subject Access Request (DSAR) policies created in the Privacy Center managed package.

Service

Determine the capacity model that was used to check agent capacity for a routed work item

Use the new CapacityModel field on the existing AgentWork object.

Determine whether a work item owner change triggered the direct assignment of the work item to the agent

 $\label{thm:changeInitiated} Use the \verb| IsOwnerChangeInitiated| field on the existing AgentWork and PendingServiceRouting objects. \\$

Determine whether a work item should stay with the preferred user even when the user is not available

Use the new IsPreferredUserRequired field on the existing AgentWork and PendingServiceRouting objects.

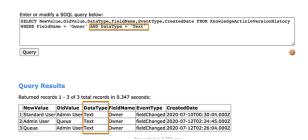
Determine whether a work item status change triggered the direct assignment of the work item to the agent

Use the IsStatusChangeInitiated field on the existing AgentWork and PendingServiceRouting objects.

Filter Knowledge history fields by data type

On the KnowledgeArticleVersionHistory object, use the new DataType field to filter and sort fields in an article's history.

For example, when you change the ownership of an article, two records are generated. One displays the user label (text) change, such as from "Standard User" to "Admin User." The other record displays the EntityID for the changed fields. You can use DataType to display, for example, just text records.



Record the local time zone on workers' time sheets

Use the new LocationTimeZone field on the existing TimeSheetEntry object.

Add a short title to describe expenses

Use the new Title field on the existing Expense object.

Include expenses in expense reports

Use the new ExpenseReportEntry object to include an expense in an expense report.

Summarize expenses in expense reports

Use the new ExpenseReport object to show a total expense amount.

Track how users accept Einstein Case Classification recommendations

On the existing AllnsightFeedback object, the meaning of the AllnsightFeedbackType field's values have changed.

- Explicit—Previously indicated that Einstein's recommendations were saved on a record. Now it means that the user applied
 and saved the recommendations from the component where they appeared, such as the Einstein Field Recommendations
 Lightning component.
- Implicit—Previously not in use. Now it means that Einstein's recommendations were followed, but the user made the updates from an external component such as the case details tab.

Identify the field for which Einstein Case Classification is making predictions

Use the new PredictionField on the AlRecordInsight object to identify the field for your insights.

Manage multiple maintenance schedules for assets

Use the MaintananceWorkRule object to define multiple maintenance schedules running at different frequencies for an asset. The MaintennanceWorkRuleID field on the WorkOrder and WorkOrderLineltem objects then identifies the maintenance rule that generated the work item.

Record product and asset warranties

Use the WarrantyTerm object to define the labor, parts, and expenses, along with any exchange options, provided to rectify issues with products. Use the ProductWarrantyTerm object to assign warranty terms to a product or product family and create standard warranties. Use the AssetWarrantyTerm object. to add details of additional or extended warranties along with exclusions and void terms for products installed or sold. Use the AssetWarrantyId field on the WorkOrder and WorkOrderLineItem objects to identify asset warranty terms associated with a work item.

Add a comment feed to a Voice Call

Use the new VoiceCallFeed object.

BEHAVIOUR CHANGE: Property changes to Voice Call Recording

The VoiceCallId field is now a required field on the VoiceCallRecording object. The nillable property of this field is removed.

REMOVED: Associated objects for sharing for Voice Call Recording are removed

The VoiceCallRecordingOwnerSharingRule and VoiceCallRecordingShare associated objects of the VoiceCallRecording object are removed. The parent object VoiceCall now controls the sharing of this object. That means, if the user has access to the parent record, the user can access the VoiceCallRecording record.

Track the user engagement metrics for a Quip thread in a Quip template or document

Use the new CollabUserEngagementMetric and CollabUserEngmtRecordLink objects.

REMOVED: IsOptedOut field in MessagingEndUser has been removed

Use the MessagingConsentStatus and IsFullyOptedIn fields on the MessagingEndUser object instead.

Queue Management

Let patrons join a digital wait-list and keep tabs on your facility occupancy with Queue Management

Use the new LocationWaitlist, LocationWaitlistedParty, and LocWaitlistMsgTemplate objects.

New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

Salesforce Overall

Be notified when a service appointment is created, updated, or deleted in Lightning Scheduler

Subscribe to the new AppointmentSchedulingEvent to receive notifications related to new, modified, or deleted service appointments in Lightning Scheduler. This event is part of Lightning Scheduler.

Service

Understand Einstein Case Classification auto-update failures

Use the new Error Code field on the existing AlUpdateRecordEvent event to troubleshoot Einstein Case Classification auto-update failures. The values are:

- none—No error occurred.
- entity locked—The case is locked for editing by an approval process.
- no access—The selected Einstein user or automatic process user doesn't have permission to update the case.
- validation rule—The update violates a case validation rule.
- other—A different error occurred.

Commerce

Be notified about errors that occur during the processing of an order summary

Subscribe to the new ProcessExceptionEvent to receive notifications related to order summary processing failures.

Security and Identity: Real-Time Event Monitoring

Write transaction security policies that track anomalies in how users make API calls

Use the new ApiAnomalyEventStore object in a security policy and ApiAnomalyEvent for real-time notifications.

Write transaction security policies that track when a user downloads the results of a Bulk API request

Use the new BulkApiResultEventStore object in a security policy and BulkApiResultEvent for real-time notifications.

Write ReportEvent policies with a condition that checks for grouped column headers

Use the new ReportEvent and ReportEventStream field GroupedColumnHeaders to filter the grouped column headers of a report.

Write ReportEvent policies with a condition that checks for displayed field entities

Use the new ReportEvent and ReportEventStream field DisplayedFieldEntities to filter the displayed fields on a report.

REST API

REST API includes changed resources.

Enjoy better error messages and error handling when using SObject Collections in the Composite family of resources

When the information for one object in an SObject Collections job contains errors (like misspelled field names), the /composite/sobjects resource's error message now identifies the object. And, if allorNone is false, the API continues to process the remaining parse-able parts of the job. (If allorNone is true, the API rolls back the entire operation.)

SOAP API

SOAP API includes changed headers and changes to some data types.

Change To Data Types In WSDL

Some data types have changed from int to long.

Where: This change applies to the Developer Edition, Enterprise Edition, Performance Edition, Professional Edition with API access enabled, and Unlimited Edition.

Why: To accommodate numbers that are too large to store in the int data type, some items now use the long type. This affects both the Enterprise and Partner WSDLs.

New, Changed, and Deprecated Calls

Changed Headers

This header has changed in API version 50.0.

OwnerChangeOptions

Three new enum fields to **OwnerChangeOption** have been added:

- Use TransferArticleOwnedPublishedVersion to change the published version of the article owner's current draft to a new owner, in addition to the current draft.
- Use TransferArticleOwnedArchivedVersions to change archived versions of the article owner's current draft to a new owner, in addition to the current draft.
- Use **TransferArticleAllVersions** to change all published and archived versions, owned by anyone, of the current draft to a new owner, in addition to the current draft.

In each case, the change of ownership applies to the language of the current draft.

SEE ALSO:

SOAP API Developer's Guide: OwnerChangeOptions (can be outdated or unavailable during release preview)

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Copy products from a cart to a wishlist and work with current carts. Get externally managed accounts. Get the body of a quick text. Send survey invitations by email.

IN THIS SECTION:

New and Changed Connect REST API Resources

These resources are new or have changes.

New and Changed Connect REST API Reguest Bodies

These request bodies are new or have changes.

New and Changed Connect REST API Response Bodies

These response bodies are new or have changes.

SEE ALSO:

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Connect REST API Developer Guide

Apex Developer Guide: ConnectApi Namespace

New and Changed Connect REST API Resources

These resources are new or have changes.

B2B Commerce on Lightning

Copy the products from a cart to a wishlist

Make a POST request to the new

 $/ \texttt{commerce/webstores} / \textit{webstoreId} / \texttt{cartStateOrId} / \texttt{actions/add-cart-to-wishlist} / \texttt{resource} \\ \text{with the new Cart to Wishlist Input request body}.$

Set the visibility of cart messages

Make a POST request to the new

/commerce/webstores/webstoreId/carts/cartStateOrId/messages/actions/set-visibility resource with the new Cart Messages Visibility Input request body.

Cart resources that include cart IDs and active carts now support current carts

Cart resources with the *cartStateOrId* query parameter now support the current value, which indicates a cart with a status that isn't closed or pending deletion.

- /commerce/webstores/webstoreId/carts/cartStateOrId
- /commerce/webstores/webstoreId/carts/cartStateOrId/actions/add-cart-to-wishlist
- /commerce/webstores/webstoreId/carts/cartStateOrId/cart-items
- /commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/batch
- /commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/cartItemId
- /commerce/webstores/webstoreId/carts/cartStateOrId/messages/actions/set-visibility

Exclude attribute and variation information when getting a product (pilot)

Note: We provide product variations and attributes to selected customers through a pilot program that requires agreement to specific terms and conditions. Product variations and attributes are subject to change and aren't generally available unless or until Salesforce announces their general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Make a GET request to the /commerce/webstores/**webstoreId**/products/**productId** resource with the new excludeAttributeSetInfo or excludeVariationInfo parameters.

Update the name of a wishlist

Make a PATCH request to the new /commerce/webstores/webstoreId/wishlists/wishlistId resource with the Wishlist Input request body.

CMS Managed Content

Get published managed content versions for a community with absolute URLs

Make a GET request to the /connect/communities/communityId/managed-content/delivery resource with the new showAbsoluteUrl request parameter set to true.

Get published managed content versions for a channel with absolute URLs

Make a GET request to the /connect/cms/delivery/channels/channels/channels/query resource with the new showAbsoluteUrl request parameter set to true.

Communities

Get externally managed accounts available to the context user across all communities

Make a GET request to the new /connect/communities/communityId/external-managed-accounts resource.

Customer Asset Lifecycle Management

Use these resources to create, change, or cancel lifecycle-managed assets for sales and account reps to view in Lightning Experience. For more information, see Understand What Your Customers Have Bought by Using Customer Asset Lifecycle Management.

Generate a lifecycle-managed asset

Make a POST request to the /asset/management/assets/**assetId**/actions/generate resource with the new Generate Asset Input request body.

Change a lifecycle-managed asset

Make a POST request to the /asset/management/assets/**assetId**/actions/change resource with the new Change Asset Input request body.

Cancel a lifecycle-managed asset

Make a POST request to the /asset-management/assets/**assetId**/actions/cancel resource with the new Cancel Asset Input request body.

Files

Retiring support for Adobe Flash renditions

The /connect/files/**fileId**/rendition resource no longer creates or returns Adobe Flash renditions. Use the /connect/files/**fileId**/previews/previewFormat resource to get an SVG rendition.

Notifications

Get a notification with the full body and title displayed

Make a GET request to the /connect/notifications/**notificationId** resource with the new trimMessages parameter set to false.

Get notifications with the full body and title displayed

Make a GET request to the /connect/notifications resource with the new trimMessages parameter set to false.

Private Connect

Get scoped inbound network topologies for a connection type

Make a GET request to the

/network-connection/inbound/connection-types/connectionType/topologies resource with the new scope parameter set to Region.

Get scoped outbound network topologies for a connection type

Make a GET request to the

/network-connection/outbound/connection-types/connectionType/topologies resource with the new scope parameter set to Region.

Ouick Text

Get the body of a quick text

Make a GET request to the new /connect/quicktextbody resource.

Salesforce Surveys

Send survey invitations by email

Make a POST request to the new /connect/surveys/**surveyId**/send-invitation-emails resource with the new Survey Email Input request body.

New and Changed Connect REST API Request Bodies

These request bodies are new or have changes.

B2B Commerce on Lightning

Cart Messages Visibility Input

This new request body has this property.

• visibility—Specifies whether to set cart messages as visible (true) or not (false).

Cart to Wishlist Input

This new request body has this property.

• wishlistId—ID of the wishlist to copy cart products to.

Distinct Value Refinement Input

This request body has this new property.

- attributeType—Search attribute type. Values are:
 - Custom
 - ProductAttribute (pilot)
 - Standard

Facetable Attribute Input

This request body has this changed property.

• type—This property now supports the ProductAttribute (pilot) value.

Wishlist Update Input

This new request body has this property.

name—Wishlist name to update.

Customer Asset Lifecycle Management

Asset Action Input

This new request body has these properties.

- actionDate—Date when the change occurred.
- amount—The change in amount resulting from the asset action.
- category—Asset action category for reporting.
- mrrChange—The change in monthly recurring revenue resulting from the asset action.
- quantityChange—The change in quantity resulting from the asset action.

Asset Action Source Input

This new request body has these properties.

- actualTax—Actual tax.
- adjustmentAmount—Adjustment amount.
- endDate—End date.
- estimatedTax—Estimated tax.
- externalReference—Data source for an external object that caused the asset action.
- externalReferenceDataSource—Data source for an external object that caused the asset action.
- productAmount—Product amount.
- quantity—Quantity.
- referenceEntityItem—ID of the Salesforce object that caused the asset action. Supported Salesforce objects: Order Product and Work Order Line Item.
- startDate—Start date.
- transactionDate—Date of the transaction related to the asset action.

Asset State Period Input

This new request body has these properties.

- amount—Amount of revenue allocated for the time defined by the asset state period.
- endDate—Service end date for the asset state period.
- mrr—Monthly recurring revenue for the time defined by the asset state period.
- quantity—Quantity of the asset during the asset state period.
- startDate—Service start date for the asset state period.

Cancel Asset Input

This new request body has these properties.

- assetAction—Asset action that caused the cancellation.
- assetActionSources—List of asset action sources.
- assetId—ID of the asset to be canceled.
- assetStatePeriod—Most recent asset state period for the canceled asset.

Change Asset Input

This new request body has these properties.

- assetAction—Action that caused a change to the asset.
- assetActionSources—List of asset action sources.
- assetId—Asset that was changed as a result of the action.

assetStatePeriod—List of asset state periods affected by the change asset call.

Generate Asset Input

This new request body has these properties.

- accountId—Asset's parent account.
- assetAction—Asset action that creates the asset.
- assetActionSources—List of asset action sources.
- assetName—Name of the new asset.
- assetStatePeriods—List of asset state periods affected by the generate asset call.
- currencyIsoCode—Three-letter ISO 4217 currency code associated with the lifecycle-managed asset record.
- productId—ID of the parent product for the asset.

Salesforce Order Management

Order Summary Input

This request body has these new properties.

- name—OrderNumber to assign to the OrderSummary.
- status—Status to assign to the OrderSummary.

Salesforce Surveys

Survey Email Input

This new request body has these properties.

- allowGuestUserResponse—Allows participants who don't have a Salesforce account to respond.
- allowParticipantsAccessTheirResponse—Allows participants to view their responses after they submit the survey.
- associateRecordsWithRecipients—Maps each recipient with another record that must be associated with the recipient's survey invitation.
- body—Content of the email. Specify the email body in case you don't specify an email template.
- collectAnonymousResponse—Allows participants to respond anonymously.
- communityId—ID of the community that's used to open the survey for users outside your org.
- emailTemplateId—ID of the email template that's used to send the survey invitation.
- fromEmailAddress—Email ID of the user or the org-wide email address associated with the user's profile.
- invitationExpirationDate—Date on which the survey invitation expires.
- invitationOwner—ID of the owner of the survey invitation records.
- isPersonalInvitation—Creates a unique invitation for each participant. When a participant responds using a personal invitation, the response record is associated with the participant's Salesforce record.
- recipientEngagementContexts—Maps each recipient with the context based on which the survey invitation is emailed.
- recipients—List of up to 300 IDs of leads, contacts, or users to whom the survey invitation is emailed.
- shareInvitationsWith—ID of the user with whom the survey invitation records must be shared. The invitation records are shared with Read access.
- subject—Subject of the email. Specify the subject in case you don't specify an email template.
- surveyQuestionIds—ID of the question that's embedded in the email.

Survey Recipient Survey Subjects Input

This new request body has these properties.

- associateRecordIds—ID of the associated records.
- recipientId—Participant ID with whose invitation the record should be associated.

Survey Recipient Engagement Context Input

This new request body has these properties.

- recipientEngagementContext—Map of additional parameters that are associated with the generated invitation for the recipient.
- recipientId—ID of the recipient.

New and Changed Connect REST API Response Bodies

These response bodies are new or have changes.

B2B Commerce on Lightning

Cart Item

This response body has these new properties.

- totalAdjustmentAmount—Total adjustment amount for the item.
- unitAdjustedPrice—Unit price, including adjustments, for the item.
- unitAdjustmentAmount—Adjustments made to the unit price for the item.

Cart Messages Summary

This response body has this new property.

• totalLineItemsWithErrors—In the Cart Item Result, either null if the cart item has no errors or 1 if the cart item has errors. In the Cart Summary, the total number of product line items that contain errors.

Cart Messages Visibility Result

This new response body has this property.

• visibility—Specifies whether cart messages are set to visible (true) or not (false).

Cart Product Attribute (Pilot)

This new response body has these properties.

- label—Label or display name of the attribute
- sequence—Sequence of the attribute within the attribute set.
- value—Display value of the attribute.

Cart Product Summary

This response body has this new property.

variationAttributes (pilot) — Variation attributes associated with the product.

Cart Summary

This response body has these new and changed properties.

- purchaseOrderNumber—Purchase order for the cart.
- status—This property now supports the pendingDelete value.

Cart to Wishlist Result

This new response body has these properties.

- productsAddedCount—Number of products copied from the cart to the wishlist.
- wishlistId—ID of the wishlist that cart products were copied to.

Distinct Value Search Facet

This response body has this changed property.

• attributeType—This property now supports the ProductAttribute (pilot) value.

Facetable Attribute

This response body has this changed property.

• type—This property now supports the ProductAttribute (pilot) value.

Product Attribute Info (Pilot)

This new response body has these properties.

- allowableValues—Allowable values for the attribute.
- apiName—API name of the attribute.
- availableValues—Attribute values that are available for product.
- fieldEnumOrId—Field ID for custom fields or enumeration value for standard fields.
- label—Label of the attribute.
- objectName—Name of the object that contains the field.
- sequence—Sequence of the attribute in the attribute set.

Product Attribute Selection Info (Pilot)

This new response body has these properties.

- apiName—API name of the attribute.
- label—Label of the attribute.
- sequence—Sequence of the attribute in the attribute set.
- value—Display value of the attribute.

Product Attribute Set (Pilot)

This new response body has these properties.

- attributes—Map of the attributes that are members of the attribute set.
- developerName—Name of the attribute set.
- id—ID of the product attribute record that represents the product attribute set.

Product Attribute Set Info (Pilot)

This new response body has these properties.

- attributeInfo—Map of the API name of the attribute field to the attribute metadata.
- description—Description of the attribute set.
- developerName—Developer name of the attribute set.
- id—ID of the attribute set.
- masterLabel—Master label of the attribute set.
- sequence—Sequence of the attribute set with regards to the product.

Product Attribute Set Summary (Pilot)

This new response body has these properties.

- apiName—API name of the attribute set.
- attributes—List of attributes in the attribute set.

• label—Display label of the attribute set.

Product Attribute Summary (Pilot)

This new response body has these properties.

- apiName—API name of the attribute.
- label—Display label of the attribute.
- sequence—Sequence of the attribute in the attribute set.
- value—Display value of the attribute.

Product Attributes to Product Entry (Pilot)

This new response body has these properties.

- canonicalKey—Attribute API values concatenated using (_) based on the sequence number of the attributes in the attribute set.
- productId—Variation product ID for the selection of attributes.
- selectedAttributes—Ordered list of attribute values and metadata that can be used to form a key that maps to product ID.

Product Detail

This response body has these new properties.

- attributeSetInfo (pilot)—Map of the attribute set developer name to its metadata.
- productClass (pilot)—Class of product. Values are:
 - Simple
 - Variation
 - VariationParent
- variationAttributeSet (pilot)—Variation attribute set associated with the product.
- variationInfo (pilot)—Available and allowable values for variation attributes and a map to resolve variation product IDs from attribute value combinations.
- variationParentId (pilot)—ID of the variation parent.

Product Summary

This response body has these new properties.

- productClass (pilot)—Class of product. Values are:
 - Simple
 - Variation
 - VariationParent
- variationAttributeSet (pilot)—Variation attribute set that is associated with the product.

Product Variation Info (Pilot)

This new response body has these properties.

- attributesToProductMappings—Map of attribute value combinations to variation product ID.
- variantAttributeInfo—Map of field API name to product attribute information.

Searchable Attribute

This response body has this changed property.

• type—This property now supports the ProductAttribute (pilot) value.

CMS Managed Content

Managed Content Channel

This response body has these new and changed properties.

- channelType—This property now supports the PublicUnauthenticated value.
- domainId—ID of the domain assigned to the channel.
- domainName—Name of the domain assigned to the channel.
- isDomainLocked—Specifies whether the domain is locked and can't be changed (true) or not (false).

Managed Content Version

This response body has this new property.

unauthenticatedUrl—Unauthenticated delivery URL.

Customer Asset Lifecycle Management

Asset Action Output

This new response body has this property.

id—ID of the asset action.

Asset Action Source Output

This new response body has these properties.

- id—ID of the asset action source.
- referenceId—ID of the Salesforce entity or external entity that caused the asset action.

Asset Output

This new response body has this property.

• id—ID of the asset.

Asset State Period Output

This new response body has this property.

• id—ID of the asset state period.

Asset Result Output

This new response body has these properties.

- asset—ID of the asset on which the API was called.
- assetAction—ID of the asset action created as a result of the API call.
- assetActionSources—Asset action sources.
- assetStatePeriods—Asset state periods.

Managed Topics

Topic Images

This response body has these changed properties.

- coverImageUrl—Featured and navigational topic images uploaded in version 50.0 are stored as asset files. Images uploaded in version 49.0 and earlier are stored as documents. This storage change results in a URL change.
- featuredImageUrl—Featured and navigational topic images uploaded in version 50.0 are stored as asset files. Images uploaded in version 49.0 and earlier are stored as documents. This storage change results in a URL change.

Notifications

Notification

This response body has this new property.

• targetPageRef—Page reference for notification target.

Personalization

Formula Scope

This new response body has these properties.

- contextValues—Map of context values for the scope.
- fields—List of fields of the scope.
- formula—Formula of the scope.

Target

This response body has these new and changed properties.

- formulaScope—Formula scope of the target.
- scope—This property isn't returned in version 50.0 and later. Instead, formulaScope returns this information.

Ouick Text

Quick Text Preview Body

This new response body has these properties.

- contextType—Context of the quick text. Value is Preview
- parts—Parts of the quick text body.

Quick Text Preview Body Part

This new response body has these properties.

- type—Type of the quick text body part. Values are:
- value—Value of the quick text body part.

Quick Text Runtime Body

This new response body has these properties.

- contextType—Context of the quick text. Value is Runtime.
- quickTextBody—Body of the quick text.

Salesforce Surveys

Survey Email

This new response body has these properties.

- errorcode—Error code for the failed call.
- errorMessage—Details explaining why the call failed.
- status—Status of the call. Possible values are: Queued, Failed.

Einstein Analytics REST API

Create, update, and retrieve auto-install requests for embedded apps using the Einstein Analytics REST API. Query replicated datasets by category and create new Salesforce datasets. Get detailed node data for individual dataflow jobs.

IN THIS SECTION:

New and Changed Einstein Analytics REST API Resources

These resources are new or have changes.

New and Changed Einstein Analytics REST API Request Bodies

These request bodies are new or have changes.

New and Changed Einstein Analytics REST API Response Bodies

These response bodies are new or have changes.

New and Changed Einstein Analytics REST API Resources

These resources are new or have changes.

Get auto-install requests

Make a GET request to the new /wave/auto-install-requests resource. Multiple request parameters can be used to filter the results.

Delete all auto-install requests for a folder or template

Make a DELETE request to the new /wave/auto-install-requests resource with the folderId or templateApiName request parameters.

Create an auto-install request

Make a POST request to the new /wave/auto-install-requests resource with the AutoInstallInput request body.

Get an auto-install request

Make a GET request to the new /wave/auto-install-requests/autoInstallRequestId resource.

Delete an auto-install request

Make a DELETE request to the new /wave/auto-install-requests/autoInstallRequestId resource.

Update an auto-install request

Make a PATCH request to the new /wave/auto-install-requests/autoInstallRequestId resource with the AutoInstallInput request body.

Get the nodes of a dataflow job

Make a GET request to the new /wave/dataflowjobs/dataflowjobid nodes resource.

Get a node of a dataflow job

Make a GET request to the new /wave/dataflowjobs/dataflowjobid/nodes/nodeId resource.

Create a Salesforce dataset

Make a POST request to the /wave/datasets resource.

Get a Salesforce dataset by dataset type

Make a GET request to the /wave/datasets resource with the new datasetTypes request parameter.

Get a connected dataset by category

Make a GET request to the /wave/replicatedDatasets resource with the new category request parameter.

New and Changed Einstein Analytics REST API Request Bodies

These request bodies are new or have changes.

Auto Install App Configuration Input (AutoInstallAppConfigurationInputRepresentation)

The new request body has these properties.

- autoShareWithLicensedUsers Indicates whether the Einstein Analytics application is automatically shared with users that are assigned the AnalyticsViewOnlyEmbeddedApp permission set (true) or not (false).
- autoShareWithOriginator Indicates whether the Einstein Analytics application is automatically shared with the user that initiated the auto-install request (true) or not (false).
- deleteAppOnConstructionFailure Indicates whether the Einstein Analytics application is deleted when a failure occurs on the WaveAppCreate request (true) or not (false).
- failOnDuplicateName Indicates whether the Einstein Analytics application creation fails when another asset exists with the same developer name (true) or not (false).
- values A map of application template variable values used to create or update the Einstein Analytics application.

Auto Install Configuration Input (AutoInstallConfigurationInputRepresentation)

The new request body has these properties.

- appConfiguration The configuration used to create or update the Einstein Analytics application.
- parentRequestIds A collection of parent auto-install request IDs that this request depends on.

Auto Install Request Insert Input (AutoInstallRequestInsertInputRepresentation)

The new request body has these properties.

- configuration The auto-install request configuration.
- folderId The Einstein Analytics application folder ID.
- requestName The name of the auto-install request.
- requestType The auto-install request type. Valid values are: OrgCompatibilityCheck, StartDataflow, WaveAppCreate, WaveAppDelete, WaveAppUpdate, and WaveEnable.
- templateApiName The Einstein Analytics template API name or ID.

Auto Install Request Update Input (AutoInstallRequestUpdateInputRepresentation)

The new request body has this property.

• requestLog - The request log of the auto-install request. Use this attribute to comment on why an auto-install request is canceled.

Base Auto Install Request Input (BaseAutoInstallRequestInputRepresentation)

The new request body has this property.

• requestStatus - The current status of the auto-install request. Valid values are: AppInProgress, Cancelled, Enqueued, Failed, InProgress, New, and Success.

Component Widget Parameters Input (ComponentWidgetParametersInputRepresentation)

The request body has this new property.

• pageName - The default page of the component.

Data Connector Input (DataConnectorInputRepresentation)

The request body has this new property.

• targetConnector - The target connector associated with the current source connector.

Dataset Input (DatasetInputRepresentation)

The request body has these new properties.

- datasetType The type of the dataset. Valid values are: Default, Live, and Trended.
- liveConnection The connection details for a live dataset.

Inherit Widget Parameters Input (InheritWidgetParametersInputRepresentation)

The new request body has this property.

• step - The step name for the widget.

Lens Step Input (LensStepInputRepresentation)

The new request body has this property.

• source - The lens asset source for the step.

Live Connection Input (LiveConnectionInputRepresentation)

The new request body has these properties.

- connectionName The developer name of the connection.
- sourceObjectName The source object name for the connection.

Table Widget Parameters Input (TableWidgetParametersInputRepresentation)

The request body has these new properties.

- collapsible Indicates whether the table is collapsible (true) or not (false).
- numberOfFrozenColumns The number of frozen columns for the table.

New and Changed Einstein Analytics REST API Response Bodies

These response bodies are new or have changes.

Auto Install App Configuration (AutoInstallAppConfigurationRepresentation)

The new response body has these properties.

- autoShareWithLicensedUsers Indicates whether the Einstein Analytics application is automatically shared with users that are assigned the AnalyticsViewOnlyEmbeddedApp permission set (true) or not (false).
- autoShareWithOriginator Indicates whether the Einstein Analytics application is automatically shared with the user that initiated the auto-install request (true) or not (false).
- deleteAppOnConstructionFailure Indicates whether the Einstein Analytics application is deleted when a failure occurs on the WaveAppCreate request (true) or not (false).
- failOnDuplicateName Indicates whether the Einstein Analytics application creation fails when another asset exists with the same developer name (true) or not (false).
- values A map of application template variable values used to create or update the Einstein Analytics application.

Auto Install Configuration (AutoInstallConfigurationRepresentation)

The new response body has these properties.

- appConfiguration The configuration used to create or update the Einstein Analytics application.
- parentRequestIds A collection of parent auto-install request IDs that this request depends on.

Auto Install Request Collection Representation (AutoInstallRequestCollectionRepresentation)

The new response body has this property.

• requests - The list of auto-install requests.

Auto Install Request Representation (AutoInstallRequestRepresentation)

The new response body has these properties.

appFromRequest - The Einstein Analytics application associated with this auto-install request.

- configuration The configuration attributes for this auto-install request.
- createdBy The user who created this auto-install request.
- createdDate The date/time this auto-install request was created.
- failedReason The reason this auto-install request failed, if applicable. Valid values are: AppConstructionFailure,
 AppCreateFailure, AppUpdateFailure, CancelFailed, DeleteFailed, DependencyCancelled,
 DependencyFailure, FailedOther, FailedToEnqueue, OrganizationIncompatible,
 RequestCancelled, RetriesExhausted, and WaveDisabled
- folderId The 18 character ID of the Einstein Analytics application for this auto-install request.
- folderLabel The folder label of the Einstein Analytics application for this auto-install request.
- id The 18 character ID of this auto-install request.
- lastModifiedBy The user who last modified this auto-install request.
- lastModifiedDate The date/time this auto-install request was last modified.
- parentRequests A collection of auto-install requests that this request depends on.
- requestLog The request log for this auto-install request.
- requestName The name of this auto-install request.
- requestStatus The current status of this auto-install request. Valid values are: AppInProgress, Cancelled, Enqueued, Failed, InProgress, New, and Success.
- requestTemplate The Einstein Analytics template used to create or update the Einstein Analytics application.
- requestType The auto-install request type. Valid values are: OrgCompatibilityCheck, StartDataflow, WaveAppCreate, WaveAppDelete, WaveAppUpdate, and WaveEnable.
- templateApiName The Einstein Analytics template API name or ID.
- templateVersion The Einstein Analytics template version.
- url The URL for the auto-install request.

Component Widget Parameters (ComponentWidgetParametersRepresentation)

The response body has this new property.

pageName - The default page of the component.

Data Connector (DataConnectorRepresentation)

The response body has this new property.

• targetConnector - The target connector associated with the current source connector.

Dataflow (DataflowRepresentation)

The response body has this new property.

definition - The representation of the dataflow nodes.

Dataflow Job (Dataflow Job Representation)

The response body has these new properties.

- nodesUrl The URL of dataflow job nodes.
- syncDataflows The dataflows to sync when this dataflow job is triggered.

Dataflow Job Node Collection Representation (DataflowJobNodeCollectionRepresentation)

The new response body has these properties.

• nodes - The collection of dataflow job nodes.

• url - The URL for the collection of dataflow job nodes.

Dataflow Job Node Representation (DataflowJobNodeRepresentation)

The new response body has these properties.

- duration The runtime in seconds for the dataflow job node.
- errorLogUrl The URL for the error log blob.
- inputRows The count of input rows for the dataflow job node.
- message The informational or error message of the dataflow job node.
- nodeType The node type of the dataflow job node. Valid values are: Append, Augment, BinDigest,
 ComputeExpression, ComputeRelative, CsvDigest, Dataset, DeleteRows, Delta, Digest, Dim2Mea,
 Export, Filter, Flatten, IndexDim, Internal, Prediction, Register, SfdcFetch, SliceDataset,
 SobjectDigest, and Update.
- outputRows The count of output rows for the dataflow job node.
- startDate The start date of the dataflow job node.
- status The run-time status of the dataflow job node. Valid values are: Aborted, Error, Pending, Running, Success, and Warning.

Dataset (DatasetRepresentation)

The response body has this new property.

• liveConnection - The live connection details for the dataset.

Inherit Widget Parameters (InheritWidgetParametersRepresentation)

The new response body has this property.

• step - The step name for the widget.

Lens Step (LensStepRepresentation)

The new response body has this property.

• source - The asset source for the step.

Live Connection (LiveConnectionRepresentation)

The new response body has these properties.

- connectionLabel The label of the connection.
- connectionName The developer name of the connection.
- sourceObjectName The source object name for the connection.

Node Row Count (NodeRowCountRepresentation)

The new response body has these properties.

- failedCount The number of failed rows for the node.
- processedCount The number of processed rows for the node.

Object Coverage (ObjectCoverageRepresentation)

The response body has this new property.

• unsupportedRecords - The specific records that are unsupported for sharing inheritance.

Output Source (OutputSourceRepresentation)

The new response body has these properties.

- inputRows The number of input rows for the sync out operation.
- isSyncOut Indicates whether this object represents a sync out connection (true) or a recipe connection (false).
- nextScheduledDate The next scheduled run time for the output source.
- outputRows The number of output rows for the sync out operation.

Recipe (RecipeRepresentation)

The response body has these new properties.

- sourceRecipe The recipe from which the current recipe was upconverted to or reverted from.
- validationDetails The validation details for a Data Prep recipe.

Recipe Validation Detail (Recipe Validation Detail Representation)

The new response body has these properties

- message The validation message for the recipe.
- nodeName The node name referenced in the validation detail.
- nodeType The node type referenced in the validation detail.
- severity The severity of the validation failure. Valid values are: Error, Fatal, and Warning.
- validationAction The action to fix the node.
- validationCode The validation code.

Replicated Dataset (Replicated Dataset Representation)

The response body has this new property.

• outputSource - The output source, either a recipe or a connection, configured for this connected object.

Table Widget Parameters (TableWidgetParametersRepresentation)

The response body has these new properties.

- collapsible Indicates whether the table is collapsible (true) or not (false).
- numberOfFrozenColumns The number of frozen columns for the table.

Unsupported Record Collection (UnsupportedRecordCollectionRepresentation)

The new response body has these properties.

- count The count of objects not covered by sharing inheritance. This value doesn't always match the length of the values array.
- values The collection of objects not covered by sharing inheritance. This collection can be shorter than the count due to limiting for the API.

Unsupported Record (UnsupportedRecordRepresentation)

The new response body has this property.

• id - The record ID.

XMD Dimension (XmdDimensionRepresentation)

The response body has this new property.

defaultAction - The default action for the dimension.

User Interface API

Work with related lists, use lightweight resources to get default values to create and clone records, and enjoy using more objects with User Interface API.

Use lightweight resources to get default values to create and clone records

To develop a UI that lets a user create or clone a record, first make a request to get default values. These new lightweight resources don't return layout information and you must specify the fields you want returned.

```
/ui-api/record-defaults/template/clone/{recordId}
/ui-api/record-defaults/template/create/{objectApiName}
```

The new resources are lightweight versions of these existing resources, which get record data for every field and return layout and object information.

```
/ui-api/record-defaults/clone/{recordId}
/ui-api/record-defaults/create/{objectApiName}
```

Retrieve the actions on a batch of related lists

To retrieve the actions on a batch of related lists for a record, use this new resource.

```
/ui-api/actions/record/{recordId}/related-list/batch/{relatedListIds}
```

The relatedListIds is optional. If you don't specify it, the response includes the actions for every related list on the specified record.

Previously, to get the actions on a batch of related lists, you used this resource.

```
/ui-api/actions/record/{recordId}/related-list/{relatedListIds}
```

As of API version 50.0, this resource doesn't support a list of relatedListIds, it supports only a single relatedListId.

Retrieve the related lists for a parent object

To get the related lists for a parent object, use this new resource.

```
/ui-api/related-list-info/{parentObjectApiName}
```

Retrieve record data for a related list

To get record data for a related list or batch of related lists, use these new resources.

```
/ui-api/related-list-records/{parentRecordId}/{relatedListId}
/ui-api/related-list-records/batch/{parentRecordId}/{relatedListIds}
```

Retrieve or update related list metadata

To get or update a related list's metadata, use this new resource.

```
/ui-api/related-list-info/{parentObjectApiName}/{relatedListId}
```

To get related list metadata for a batch of related lists, use this new resource.

```
/ui-api/related-list-info/batch/${parentObjectApiName}/${relatedListIds}
```

Retrieve the record count for a related list

To get the record count for a related list or batch of related lists, use these new resources.

```
/ui-api/related-list-count/{parentRecordId}/{relatedListId}
/ui-api/related-list-count/batch/{parentRecordId}/{relatedListIds}
```

Get specific navigation items (Beta)

Use the new navItemNames parameter to limit a response to specific navigation items to include in the response. The names are TabDefinition names.

GET /ui-api/nav-items?navItemNames=accounts, tasks, approvals

Supported Objects

Most User Interface API resources support these objects. List views resources, most recently used (MRU) list views resources, and related list resources support a smaller set of objects, which are listed in the following sections.

- ActionPlan
- AiVisitRecommendation
- AiVisitRecommendRequest
- AssessmentIndValue
- AssetWarranty
- DeliveryTask
- Examination
- ExpenseReport
- ExpenseReportEntry
- IndividualApplication
- LoanApplicant
- LoanApplicantAddress
- LoanApplicantDeclaration
- LoanApplicantEmployment
- LoanApplicantIncome
- LoanApplicationAsset
- LoanApplicationFinancial
- LoanApplicationLiability
- LoanApplicationProperty
- LoanApplicationTitleHolder
- LoyaltyBenefit
- LoyaltyBenefitType
- LoyaltyLedger
- LoyaltyTierBenefit
- MessagingChannel
- MessagingEndUser
- MessagingSession
- MsgChannelLanguageKeyword
- OperatingHoursHoliday
- OpportunityParticipant
- OtherComponentTask
- PersonExamination
- PgmRebateTypBnftMapping

- PreliminaryApplicationRef
- ProductAttribute
- ProductAttributeSet
- ProductAttributeSetItem
- ProductAttributeSetProduct
- ProductServiceCampaign
- ProductTransfer
- ProductWarrantyTerm
- ProgramRebateType
- ProgramRebateTypeBenefit
- ProgramRebateTypeFilter
- ProgramRebateTypePayout
- ProgramRebateTypPayoutSrc
- RebateMemberProductAggregate
- RebatePayment
- RebatePayoutAdjustment
- RebateProgram
- RebateProgramMember
- RebateProgramMemberPayout
- RebateProgramPayoutPeriod
- ReceivedDocument
- RegulatoryAuthority
- RegulatoryAuthorizationType
- RegulatoryCodeAssessmentInd
- RegulatoryCodeViolation
- ResidentialLoanApplication
- SetupAssistantStep
- ShiftPattern
- SignatureTask
- SignatureTaskLineItem
- TrainingCourseParticipant
- TransactionJournal
- TrnCourse
- ViolationEnforcementAction
- ViolationType
- WarrantyTerm
- WaveAutoInstallRequest
- WebStoreCatalog

Supported Objects for List Views Resources

AiVisitRecommendation

- AiVisitRecommendRequest
- AssetWarranty
- DeliveryTask
- Examination
- ExpenseReport
- ExpenseReportEntry
- IndividualApplication
- LoyaltyBenefit
- LoyaltyBenefitType
- LoyaltyLedger
- LoyaltyTierBenefit
- MessagingChannel
- MessagingSession
- OperatingHoursHoliday
- OpportunityParticipant
- PersonExamination
- PgmRebateTypBnftMapping
- PreliminaryApplicationRef
- ProductServiceCampaign
- ProductTransfer
- ProductWarrantyTerm
- ProgramRebateType
- ProgramRebateTypeFilter
- ProgramRebateTypeBenefit
- ProgramRebateTypePayout
- ProgramRebateTypPayoutSrc
- RebateMemberProductAggregate
- RebatePayment
- RebatePayoutAdjustment
- RebateProgram
- RebateProgramMember
- RebateProgramMemberPayout
- RebateProgramPayoutPeriod
- RegulatoryAuthority
- RegulatoryAuthorizationType
- RegulatoryCodeAssessmentInd
- RegulatoryCodeViolation
- ShiftPattern
- SignatureTask
- SignatureTaskLineItem

- TrainingCourseParticipant
- TransactionJournal
- TrnCourse
- ViolationEnforcementAction
- ViolationType
- WarrantyTerm

Supported Objects for MRU List Views Resources

- AiVisitRecommendation
- AiVisitRecommendRequest
- AssetWarranty
- DeliveryTask
- Examination
- ExpenseReport
- ExpenseReportEntry
- IndividualApplication
- LoyaltyBenefit
- LoyaltyBenefitType
- LoyaltyLedger
- LoyaltyTierBenefit
- MessagingChannel
- MessagingSession
- OperatingHoursHoliday
- OpportunityParticipant
- PersonExamination
- PgmRebateTypBnftMapping
- PreliminaryApplicationRef
- ProductServiceCampaign
- ProductTransfer
- ProductWarrantyTerm
- ProgramRebateType
- ProgramRebateTypeBenefit
- ProgramRebateTypeFilter
- ProgramRebateTypePayout
- ProgramRebateTypPayoutSrc
- RebateMemberProductAggregate
- RebatePayment
- RebatePayoutAdjustment
- RebateProgram
- RebateProgramMember
- RebateProgramMemberPayout

- RebateProgramPayoutPeriod
- RegulatoryAuthority
- RegulatoryAuthorizationType
- RegulatoryCodeAssessmentInd
- RegulatoryCodeViolation
- ShiftPattern
- SignatureTask
- SignatureTaskLineItem
- TrainingCourseParticipant
- TransactionJournal
- TrnCourse
- ViolationEnforcementAction
- ViolationType
- WarrantyTerm

Supported Objects for Related List Resources

- ActionPlanTemplateItem
- ActionPlanTemplateItemValue
- ActionPlanTemplateVersion
- AssessmentTask
- Asset
- AuthorizedInsuranceLine
- Claim
- ClaimCase
- ClaimItem
- ClaimParticipant
- ContactEncounterParticipant
- Contract
- ContractContactRole
- ContractLineItem
- CoverageType
- DistributorAuthorization
- Entitlement
- EntityMilestone
- Expense
- HealthcareProvider
- Individual
- InsuranceClaimAsset
- InsurancePolicyAsset
- InsurancePolicyCoverage
- InsurancePolicyParticipant

- JobProfile
- LoanApplicant
- LoanApplicantDeclaration
- LoanApplicantEmployment
- LoanApplicantIncome
- LoanApplicationAsset
- LoanApplicationFinancial
- LoanApplicationTitleHolder
- Location
- LoyaltyBenefit
- LoyaltyProgramMember
- LoyaltyProgramPartner
- LoyaltyTier
- LoyaltyTierGroup
- MaintenanceAsset
- MaintenancePlan
- MessagingSession
- ProducerPolicyAssignment
- ProductCoverage
- ProductTransfer
- ProductWarrantyTerm
- ProgramRebateType
- ProgramRebateTypeBenefit
- ProgramRebateTypeFilter
- ProgramRebateTypePayout
- Quote
- QuoteDocument
- QuoteLineItem
- RebateMemberProductAggregate
- RebatePayoutAdjustment
- RebateProgramMember
- RebateProgramMemberPayout
- RebateProgramPayoutPeriod
- RecordsetFilterCriteria
- ResourceAbsence
- ResourcePreference
- RetailVisitKpi
- ReturnOrder
- ReturnOrderLineItem
- SalesAgreementProduct

- SalesAgreementProductSchedule
- ServiceAppointment
- ServiceContract
- ServiceCrewMember
- ServiceResource
- ServiceResourceSkill
- SkillRequirement
- SurveyResponse
- Tenant
- TimeSheet
- UsageEntitlement
- UsageEntitlementPeriod
- User
- Visitor
- WorkOrder
- WorkOrderLineItem
- WorkPlanSelectionRule
- WorkPlanTemplate
- WorkStep
- WorkStepTemplate

Bulk API 2.0

These calls are changed in API version 50.0.

Use Hard Delete Operations in Bulk API 2.0 To Permanently Delete Items

Bulk API 2.0 ingest jobs now support the hardDelete operation.

Specify a Default Namespace When Creating A Job

Bulk API 2.0 now supports the Sforce-Call-Options header to specify a default namespace when creating a job.

Get Data From Big Objects

Bulk API 2.0 query jobs now support Salesforce big objects.

Return Columns in the Order Requested for Bulk API 2.0 Queries

Bulk API 2.0 queries now return the response columns in the same order that you requested them instead of alphabetically. You must use the same API version for the POST and GET requests to create and monitor a bulk query, otherwise a 409 error is returned.

Tooling API New and Changed Objects

Tooling API includes new and changed objects.

Service

Create a custom component for an Embedded Service

Use the EmbeddedServiceCustomComponent object. Introduced in API version 44.0, this object has been added to the *Tooling API Developer Guide*.

Turn on a Flow feature for an Embedded Service

Use the EmbeddedServiceFlow and EmbeddedServiceFlowConfig objects. Introduced in API version 45.0, these objects have been added to the *Tooling API Developer Guide*.

Set up a Channel Menu for an Embedded Service

Use the EmbeddedServiceMenuSettings and EmbeddedServiceMenuItem objects. Introduced in API version 47.0, this object has been added to the *Tooling API Developer Guide*.

Communities

Get metadata about a branding set or branding set property

Introduced in API version 40.0, the BrandingSet and BrandingSetProperty objects are now included in the Tooling API Reference and Developer Guide.

Customization

Specify the API version for running a flow

Use the ApiVersion field on the Flow object. For more information, see Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience on page 451.

Obtain information about a Release Update

Use the new ReleaseUpdate object.

Development

Manage enriched fields for Change Data Capture

Use the new EnrichedField object to query, retrieve, or delete enriched fields. Add an enriched field as part of PlatformEventChannelMember.

Specify an org whose shape (features, settings, limits, and licenses) you want to use to create scratch orgs for metadata validation during creation of a second-generation managed package or unlocked package

Use the new SourceOrg field on the Package2VersionCreateRequest object. The source org must be a production org.

Set a user to receive email notifications about errors regarding your unlocked and second-generation managed packages Use the new PackageErrorUsername field on the Package2 object.

Determine whether a SourceMember object represents a new entity or a change to an existing entity

Use the new IsNewMember field on the SourceMember object.

Metadata API

Metadata API includes new and changed types and fields.

Salesforce Overall

Display related list hover links at the top of record detail pages and custom object detail pages in Setup

Use the ${\tt enableRelatedListHovers}$ field on the UserInterfaceSettings metadata type.

Add a custom theme color to in-app guidance

Use the themeColor and themeSaturation fields on the Prompt metadata type.

Lightning Scheduler

Associate a custom Apex class with a scheduling policy to check external calendars for service resource availability

Use the new extCalEventHandler field on the AppointmentSchedulingPolicy metadata type.

Define appointment time slots that are longer than an hour

Use the new values in the appointmentStartTimeInterval field on the AppointmentSchedulingPolicy metadata type.

Salesforce Einstein

Define whether to log customer inputs as part of conversation data

Use the new logPrivateConversationData field on Bot metadata type. Introduced in API version 48.0, this field has been added to the Metadata API Developer Guide.

Assign system functions to a dialog

Use the new ConversationSystemDialog subtype of the BotVersion metadata type. Introduced in API version 48.0, this subtype has been added to the Metadata API Developer Guide.

Define the language provider used for a particular language

Use the new nlpProviders field on the existing BotVersion metadata type. Introduced in API version 49.0, this field has been added to the Metadata API Developer Guide.

Identify the bot behavior in Conversation Repair scenarios

Use the new optionalCollect field on the BotVariableOperation metadata type. Introduced in API version 48.0, this field has been added to the Metadata API Developer Guide.

Add repair attempts to Conversation Repair

Use the new retryMessages field on the existing BotVariableOperation metadata type. Introduced in API version 48.0, this field has been added to the Metadata API Developer Guide.

Define the language or natural language service assigned to a bot version

Use the new ConversationDefinitionNlpProvider subtype on the BotVersion metadata type. Introduced in API version 49.0, this subtype has been added to the Metadata API Developer Guide.

Sales

Manage deal change highlights settings for the opportunity Amount and Close Date fields

Use the oppAmountDealMotionEnabled and oppCloseDateDealMotionEnabled fields on the OpportunitySettings metadata type.

Enable the Inbox mobile app to use Microsoft Intune for device and application management

Use the new enableInboxMobileIntune field on the EmailIntegrationSettings metadata type.

Learn whether the event changes you make in Salesforce are synced with Outlook and Gmail.

Use the new orgIsSyncingEventsOutbound field on the EmailIntegrationSettings metadata type.

Service

Customize your Embedded Service Chat feature

Use the new embeddedServiceCustomizations field on the EmbeddedServiceFlowConfig and EmbeddedServiceMenuSettings metadata types.

Enable voting for the Knowledge products and features

Use the new votingEnabled field on the KnowledgeSettings metadata type.

Enable the optimization service to access data for Field Service

Use the new optimizationServiceAccess field on the FieldServiceSettings metadata type.

Restrict access to conversation entries in Live Messaging

Use the new enableCheckCEUserPerm field on the LiveMessageSettings metadata type.

Mass update forecasts and Sales agreements with Flow

Use the new massUpdateAccountForecast and massUpdateSalesAgreement enums in the actionType field on the FlowActionCall subtype of the Flow metadata type.

Analytics

Enable Secure Image Sharing and Downloading

Use the new enableSecureImageSharing field on the AnalyticsSettings metadata type.

Enable the Watchlist Feature for Analytics Assets

Use the new enableOrgHasWatchlistEnabled field on the AnalyticsSettings metadata type.

Enable the Lightning Experience Report Feature to Automatically Add Custom Report Type Fields When Reports Are Created

Use the new enableReportCrtAutoAddPref field on the AnalyticsSettings metadata type.

Enable Priority-Based Dataflow Request Scheduling

Use the new enableRequestPrioritySchdl field on the AnalyticsSettings metadata type.

Enable Custom Fiscal Year to Import Custom Fiscal Year Definitions from Salesforce to Analytics.

Use the new enableWaveCustomFiscal field on the AnalyticsSettings metadata type.

Enable Multi-Value Dimension Indexing

Use the new enableWaveIndexMVDim field on the AnalyticsSettings metadata type.

Specify the Maximum Number of Hours an Analytics App can be InProgress

Use the new maxHoursAppInProgress field on the AnalyticsSettings metadata type.

Specify Whether the Year End in Analytics is the Fiscal Year End or the Calendar Year End

Use the new setWaveIsYearEndFiscalYear field on the AnalyticsSettings metadata type.

REMOVED: These fields are removed from the AnalyticsSettings metadata type in APU version 50.0

- analyticsCalendarApp
- canEnableLiveMetrics
- enableDataBlending
- inheritSharingForNonOpptyObjects
- inheritSharingForOpptyObject

Communities

Migrate new navigational and featured topic images

Use the ContentAsset and ManagedTopics metadata types. For managed topic images that were uploaded in API version 49.0 and earlier, use the Document and ManagedTopics metadata types.

Chatter

Turn off notifications from Chatter Questions

Use the new noQnOwnNotifyOnCaseCmt, noQnOwnNotifyOnRep,noQnSubNotifyOnBestR, and noQnSubNotifyOnRep fields on the ChatterEmailsMDSettings metadata type.

Customization

BEHAVIOR CHANGE: The enableSecureGuestAccess field on the SharingSettings type is always true, regardless of the value that you set

Changing the value of enableSecureGuestAccess has no effect on Salesforce.

REMOVED: The enableDynamicForms field on the RecordPageSettings type is removed

The enableDynamicForms field is removed in API version 50.0.

Connect to Isotope as an external data sources

Use the new ContenHubIsotope value on the type field of the ExternalDataSource metadata type.

Understand the Custom Permissions License Required Option

If you use Salesforce managed packages, the isLicensed field, which is read-only, on the CustomPermission object indicates if the custom permission requires Salesforce licenses.

Ensure that only permissions accessible to your org are enabled when cloning profiles

Use the new restrictedProfileCloning field in the UserManagementSettings metadata type. If false, all permissions currently enabled in the source profile are also enabled for the cloned profile, even if your org can't access them.

Lightning Flow

Specify the API version for running a flow

Use the apiversion field on the Flow metadata type. For more information, see Adopt Run-Time Behavior Changes for Individual Flows and Processes at Your Convenience on page 451.

Remember the text view setting for the Text Template flow resource

Use the new isViewedAsPlainText field on the FlowTextTemplate subtype of the Flow metadata type.

Restrict a FlowDecision's rules to only evaluate as true if the triggering record didn't meet the conditions before the triggering update and the \$Record now meets the conditions

Use the new doesRequireRecordChangedToMeetCriteria field on the FlowRule metadata subtype of the Flow metadata type.

Run a record-triggered flow only when a record is updated from not meeting specified criteria to meeting those criteria

Use the new doesRequireRecordChangedToMeetCriteria field on the FlowRule subtype of the Flow metadata type. For more information, see Improve Performance With Record-Triggered Flows That Run Only for Specific Changes on page 446.

Filter Flow query results by setting conditional filter logic with the "AND" and "OR" operators

Use the new filterLogic field on the FlowRecordDelete, FlowRecordLookup, FlowRecordUpdate, FlowStart, and FlowDynamicChoiceSet subtypes of the Flow metadata type.

Debug a flow in a sandbox org as another user

Use the new canDebugFlowAsAnotherUser field on the FlowSettings metadata type. For more information, see Debug Flow Errors in Sandbox Org as Another User on page 439.

Improve the layout of flow screens by using sections and columns to organize fields (pilot)

Use these new fields and values on the FlowScreenField subtype of the Flow metadata type.

- To specify that a screen field is a section, use the new RegionContainer value of the fieldType field.
- To specify that a screen field in a section is a column, use the new Region value of the fieldType field.
- To add a column to a section, or to add a screen field to a column, use the new fields field.

For more information, see Build Multi-Column Screens in Flow Builder (Pilot) on page 442.

REMOVED: The sendEmailsEvenWhenAutomationUpdatesSameRecord field on the EmailAdministrationSettings type is removed

The sendEmailsEvenWhenAutomationUpdatesSameRecord field is removed in API version 50.0.

REMOVED: The enableInvocableFlowFixEnabled field on the FlowSettings type is removed

The enableInvocableFlowFixEnabled field is removed in API version 50.0.

Security and Identity

Secure SAML requests and responses when Salesforce is the identity provider

Use the new samlSigningAlgoType field on the ConnectedApp metadata type.

REMOVED: The requireInsecurePortalAccess field on the CustomSites metadata type is removed

The requireInsecurePortalAccess field is removed in API version 50.0.

Enable Cross-Origin Resource Sharing (CORS) for certain OAuth endpoints

Use the new enableOauthCorsPolicy field on the SessionSettings metadata subtype of the SecuritySettings metadata type.

View and modify PEM-enabled user authentication certificates

Use the new UserAuthCertificate metadata type.

Prevent logins from UserDevices with revoked access

Use the new enforceUserDeviceRevoked field on the SessionSettings metadata subtype of the SecuritySettings metadata type.

Development

Enable simulation mode to test custom integrations from nonproduction environments with AppExchange App Analytics

Use the new enableSimulationMode field on the new AppAnalyticsSettings metadata type.

Prevent consecutive API navigation calls in Visualforce

Use the new enableNoBackgroundNavigations field on the LightningExperienceSettings metadata type.

Enable secure static resources for Lightning components

Use the new enableAuraSecStaticResCRUCPref field on the LightningExperienceSettings metadata type. This field is related to the Enable Secure Static Resources for Lightning Components release update.

Customer 360 Audiences

Modify or manage Customer 360 Audiences data stream, lake and model objects with the Customer 360 Audiences Metadata Api

Review the new DataSource, DataStreamDefinition, and MktDataTranObject metadata types to see the modification possibilities.

Quip: Template Management, New User Engagement Template Metrics, Salesforce Data in the Relationship Map Live App, Filtered List Views, and More

Mark your embedded Quip documents as templates. Increase template adoption with the Template Library in Quip. Get granular user engagement metrics to see how users are employing Quip templates. Add inline live Salesforce data mentions to a Quip document or spreadsheet. Create hybrid Salesforce and Quip relationship maps.

IN THIS SECTION:

Discover Quip for Customer 360 Features with the Quip Setup Starter Managed Package

To get a taste of the most-used Quip for Customer 360 features, install the Quip Setup Starter managed package. Quip Setup Starter saves you time creating templates, setting up Quip Lightning components, configuring automation, and more. You can install the managed package in your sandbox to test it out without impacting your org, or install it directly in your production Salesforce org.

Manage Your Quip Templates in Quip and Salesforce (Template Library)

To differentiate Quip documents that your team uses as templates, mark your documents as templates. See what documents are embedded in Salesforce based on the object, convert your embedded documents to templates, and access them from the Template Library in Quip.

Use Metrics to Report on User Engagement with Embedded Quip Templates

See which users are interacting with Quip documents and who needs coaching. Use reports and dashboards to understand trends in user engagement on documents and templates. Metrics are available for documents and templates associated with Salesforce records.

Add In-Line Salesforce Record Fields to a Quip Document (Data Mentions)

Add live Salesforce data to your Quip documents, spreadsheets, and Account Plans without getting in the way of your formatting. With in-line data mentions, data reads like normal text but stays up to date and syncs with Salesforce. You can even edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.

Create a Relationship Map in Quip with Live Salesforce Data

Build relationship maps in your Account Plans with imported Salesforce record data. To add data to your maps that exists outside of Salesforce, create custom Quip cards.

Use Salesforce Record Permissions to Determine Access to Linked Quip Documents

Synced Sharing provides a set of options for governing access to Quip documents associated with Salesforce records. With the new Salesforce Record Access option, users with access to a Salesforce record have the same access to its linked Quip documents. You can set your linked Quip document access at the org level without compromising security.

Manage Live Salesforce Data in Quip

Keep your Salesforce data in Quip secure and dynamic with Mirrored Salesforce Permissions and disable live reports functionality. After you turn on Mirrored Salesforce Permissions, users in Quip can access only the same Salesforce data in Quip as in Salesforce.

Test the Health of Your Quip Connection to Salesforce

Use the Quip Health Check to run a series of automated tests on your Quip site and Salesforce org connection. When the Quip Health Check identifies problems, it provides on-the-spot results and solutions to get your connection up and running. You can run a Health Check for a Quip site's connection to Salesforce or for an individual user's Quip and Salesforce connection.

Customize Your Salesforce List Views with Filters in Quip

Curate your Salesforce List live apps in Quip to show only the records that you care about. With customizable filters in Quip, users with edit access to the document can filter list views and related lists based on the fields that they specify. Related lists are easier to manage and users can filter out old or irrelevant records over time.

Simplify Your Quip for Customer 360 Setup, Enablement Process, and Other Enhancements

We enhanced the Quip for Customer 360 experiences in Quip and Salesforce.

Build Custom Automations with New Quip APIs

Use Quip API endpoints to automate your business processes and get your team in sync.

Discover Quip for Customer 360 Features with the Quip Setup Starter Managed Package

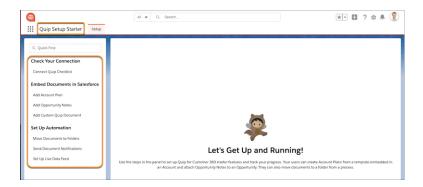
To get a taste of the most-used Quip for Customer 360 features, install the Quip Setup Starter managed package. Quip Setup Starter saves you time creating templates, setting up Quip Lightning components, configuring automation, and more. You can install the managed package in your sandbox to test it out without impacting your org, or install it directly in your production Salesforce org.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: See what's possible with Quip for Customer 360 with a Salesforce managed package. Use the pre-configured settings, or configure your own to meet your business needs. Create Account Plan and Opportunity Notes templates, embed them in Salesforce records, and set up automation to determine when a document is created from a template, all from the managed package. The Quip Setup Starter also checks your Quip and Salesforce connection to make sure that everything is ready to go. When you're done, you can keep the Quip Setup Starter configurations or safely delete them to create your own from scratch.

How:



Download the Quip Setup Starter managed package in a sandbox or production org, and follow the guided steps.

SEE ALSO:

Install the Quip Setup Starter Managed Package Quip Setup Starter Features

Quip Setup Starter Overview Video

Manage Your Quip Templates in Quip and Salesforce (Template Library)

To differentiate Quip documents that your team uses as templates, mark your documents as templates. See what documents are embedded in Salesforce based on the object, convert your embedded documents to templates, and access them from the Template Library in Quip.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

When: Use the Template Manager and template validation by the Sandbox Preview. Mark documents as templates and access private galleries on web by October 2020 and on the desktop Quip app by early November 2020.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Increase template user adoption in Quip. Make it easier to differentiate between your Quip documents and templates by marking them as templates. Easily manage your Quip templates with private galleries.

How: Get started with Quip templates with the following features.

Mark Document as Template

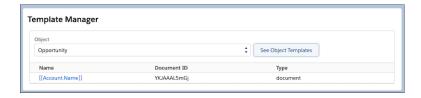
To easily find and use Quip documents used as templates, mark them as templates from Quip. You can also keep templates more secure from accidental edits and indicate that the template is ready to use with template locking. To make edits to it later, unlock it. After you mark a document as a template, share it with others, or keep it in your Created by Me private gallery. Users and admins can mark documents as templates. After you mark a document as a template, you can't reset it.

Manage Quip Templates with the Template Library

Make it easy for you and your users to find and create templates in Quip. Let your end users choose where they work and create documents from templates in Quip. With the Quip Template Library, users can create and share templates in private galleries, like the Created by Me and Shared with Me galleries, or get started with sample templates.

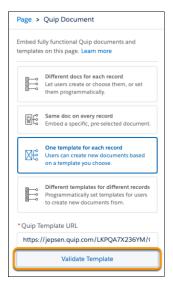
• Surface Embedded Documents from the Template Manager

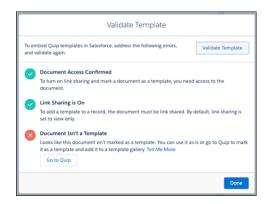
To see which Quip documents are embedded in Salesforce records via the Quip Document component, go to the Template Manager in the Quip Setup page. In Salesforce, go to Setup, and enter Quip in the Quick Find box. Find the Template Manager and select an object to see its embedded documents. From there, you can open a preview of the document in Quip and mark it as a template. You can mark as templates only the documents that you have full access to in Quip.



• Validate Quip Templates from the Quip Document Component

To make sure that documents added to Quip Document component in the Lightning App Builder are templates, link shared, and that you have access to them, click **Validate Template**. Template validation saves you time troubleshooting possible errors and helps to convert your new Quip documents to templates.





SEE ALSO:

Quip Support: Getting Started with Templates

Salesforce Help: Manage Quip Templates in Salesforce (can be outdated or unavailable during release preview)

Salesforce Help: Add the Quip Document Component to a Lightning Page (can be outdated or unavailable during release preview)

Use Metrics to Report on User Engagement with Embedded Quip Templates

See which users are interacting with Quip documents and who needs coaching. Use reports and dashboards to understand trends in user engagement on documents and templates. Metrics are available for documents and templates associated with Salesforce records.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Add new Quip user engagement metrics to your Lightning dashboards. Use data to determine which business processes are working and which can be revisited. With Quip for Customer 360 engagement metrics, you can measure your template adoption and adjust your template strategy to meet your users' needs.

How: In Setup, in the Quick Find box, enter *Quip*. Under Gather Data on Quip for Customer 360 Usage, click **Turn on Quip Metrics**. Create Lightning reports and graphs using Quip engagement metrics, and them to your dashboards. It takes 48 hours for metrics data to refresh. To report on Quip engagement, turn on metrics at least 2 days before.

SEE ALSO:

Salesforce Help: Report on Quip Engagement (can be outdated or unavailable during release preview)

Salesforce Help: Quip Engagement Metrics (can be outdated or unavailable during release preview)

Salesforce Help: Report on Quip Template Usage (can be outdated or unavailable during release preview)

Salesforce Help: Report on Quip Template User Engagement (can be outdated or unavailable during release preview)

Add In-Line Salesforce Record Fields to a Quip Document (Data Mentions)

Add live Salesforce data to your Quip documents, spreadsheets, and Account Plans without getting in the way of your formatting. With in-line data mentions, data reads like normal text but stays up to date and syncs with Salesforce. You can even edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

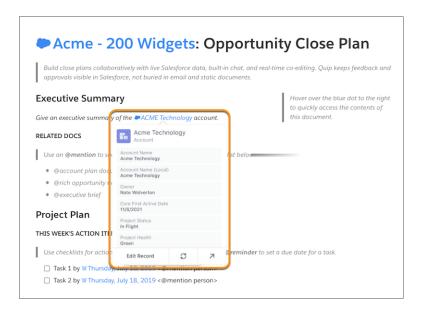
When: Add live Salesforce record fields to Quip documents by October 31 2020. Not available by the Salesforce Sandbox Preview.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Keep your Account Plans up to date and account-specific. Your sales reps are always equipped with the latest information and can choose to work from Quip or Salesforce. Use live Salesforce data mentions to create a hybrid Quip and Salesforce experience. Create a custom spreadsheet in Quip that pulls data from multiple sources and includes live Salesforce data mentions at the field level. Collaboration with other teams, even teams that don't use Salesforce, is a breeze and all of your data is in one place.

How: To set up live Salesforce data mentions, Quip creates and assigns the Allow Salesforce Collaboration Object Access C2C permission set by default.

In a Quip document or spreadsheet, users can mention a Salesforce record, and then can select one of its fields. Users can see and add only the fields they have access to in Salesforce. Users who can view a Quip document can see live Salesforce mentions added to it. Only users with edit access to the fields can sync edits to Salesforce.



Create a Relationship Map in Quip with Live Salesforce Data

Build relationship maps in your Account Plans with imported Salesforce record data. To add data to your maps that exists outside of Salesforce, create custom Quip cards.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

When: Add Salesforce data to your relationship maps by October 2020. Not available by the Salesforce Sandbox Preview.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Help your sales reps keep on top of their account planning with customizable Salesforce relationship maps. Create cards from Salesforce Contact records to visualize your key stakeholders, and sync edits in Quip back to Salesforce. Add custom Quip cards to your Salesforce maps to organize data that doesn't exist in Salesforce or that doesn't belong there. Your map's Salesforce data stays up to date so that your team is always in sync without hindering collaboration.

How: In a Quip document, enter <code>@Relationship Map</code>. To add Salesforce data to your custom Quip map, go to the Map Builder, and click **Import from Salesforce**. Select the records you want to import, and click **Import**.

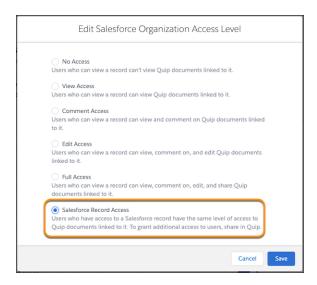
Use Salesforce Record Permissions to Determine Access to Linked Quip Documents

Synced Sharing provides a set of options for governing access to Quip documents associated with Salesforce records. With the new Salesforce Record Access option, users with access to a Salesforce record have the same access to its linked Quip documents. You can set your linked Quip document access at the org level without compromising security.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

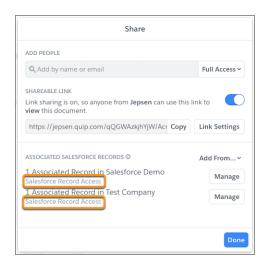
Why: Use the Synced Sharing Salesforce Record Access option to align your linked Quip document access with Salesforce record permissions. You save time setting up document access at the org level while ensuring that your org's data and information stay secure.



To further manage document access, you can now restrict Synced Sharing document membership. Users added to a document through Synced Sharing don't become permanent document members. When their Synced Sharing access level changes, so does their document access. If a user loses access to a record, they also lose access to its linked Quip documents.



Users can now see when Synced Sharing is enabled. To let users know when their documents are shared with record members, users are notified when they try to link a private document to a Salesforce record. They can also see the level of access that record members have to their linked document from the Share button.



SEE ALSO:

Salesforce Help: Synced Sharing (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Synced Sharing (can be outdated or unavailable during release preview)

Salesforce Help: Limit Synced Sharing Document Access (can be outdated or unavailable during release preview)

Manage Live Salesforce Data in Quip

Keep your Salesforce data in Quip secure and dynamic with Mirrored Salesforce Permissions and disable live reports functionality. After you turn on Mirrored Salesforce Permissions, users in Quip can access only the same Salesforce data in Quip as in Salesforce.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Simplify Salesforce access questions in Quip with Mirrored Salesforce Permissions. Keep sensitive Salesforce data secure in Quip without getting in the way of collaboration. Users can see only the data in Quip that they can access in Salesforce, making it easier for users to share and collaborate without privacy concerns.

How: From the Quip Admin Console, turn on Mirrored Salesforce Permissions.

SEE ALSO:

Mirrored Salesforce Permissions
Enable Mirrored Salesforce Permissions
Enable Live Salesforce Reports in Quip

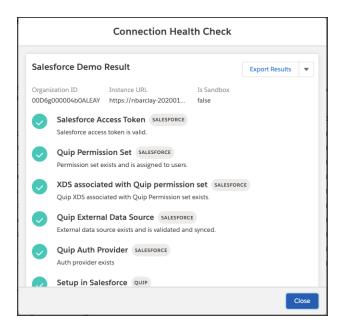
Test the Health of Your Quip Connection to Salesforce

Use the Quip Health Check to run a series of automated tests on your Quip site and Salesforce org connection. When the Quip Health Check identifies problems, it provides on-the-spot results and solutions to get your connection up and running. You can run a Health Check for a Quip site's connection to Salesforce or for an individual user's Quip and Salesforce connection.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

How: From the Quip Admin Console, go to Settings, and select **Salesforce**. Under Connected Salesforce Orgs, click **Test Connection Health**.



Customize Your Salesforce List Views with Filters in Quip

Curate your Salesforce List live apps in Quip to show only the records that you care about. With customizable filters in Quip, users with edit access to the document can filter list views and related lists based on the fields that they specify. Related lists are easier to manage and users can filter out old or irrelevant records over time.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

When: Add filters to the Salesforce List live app in Quip by late October 2020. Not available by the Salesforce Sandbox Preview.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Simplify Your Quip for Customer 360 Setup, Enablement Process, and Other Enhancements

We enhanced the Quip for Customer 360 experiences in Quip and Salesforce.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

When: Get enhanced Quip for Customer 360 features by late September 2020. Not available by the Salesforce Sandbox Preview.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: Enhancements to Quip for Customer 360 features include the following.

- Use Salesforce single sign-on (SSO) to automatically connect Salesforce to Quip.
 - When setting up the Quip and Salesforce connection, users that use the same SSO for Quip and Salesforce don't have to log in to Salesforce again from Quip.
 - Salesforce live apps and integrations automatically connect to the SSO org.
- Create a custom URL field for your Quip templates from the Quip Document component.

- To save clicks and time, create a custom field to store your embedded Quip documents from the Lightning App Builder.
- Let users mark a Salesforce org as preferred for Salesforce data in Quip.
 - Users with multiple connected orgs can choose a preferred org.
 - Live apps, live mentions, log activity, and reports pull data from the preferred Salesforce org unless manually changed.
 - Users can mark only orgs on the Salesforce allowlist in Quip as preferred.
- Log activity for all custom and standard Salesforce objects from a Quip document.
- Add calls, tasks, and events to supported activity types in Quip.

Build Custom Automations with New Quip APIs

Use Quip API endpoints to automate your business processes and get your team in sync.

Where: This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

When: Use new Quip Automation API endpoints by October 2020. Export Quip documents to PDFs by November 2020. Not available by the Salesforce Sandbox Preview.

Who: Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Why: New Quip API endpoints include the following.

- Export to PDF Automation API
 - To mark an approval cycle as complete or take a record-keeping snapshot, export a Quip document to a PDF.
 - Generate a PDF from a Quip document, and attach it to a designated Quip document.
- Live App Export Automation API
 - To analyze your live app data, help with Salesforce org migrations, or reinitialize live apps somewhere else, use the Export Live App API.
 - To meet your specific business needs, customize live apps.
 - Export a Salesforce live app to an HTML tag that can be turned back to a live app.
- Locked Sections Automation API
 - To maintain the integrity of your Quip templates and standardize best practices, lock template sections.
 - Lock and unlock document sections.

Pardot: Email in Lightning, Einstein Enhancements, and More Customizations

Create, send, and manage your email templates and email content with an enhanced email experience. Connect to Salesforce CMS to host and reuse images for email marketing, and get rollup metrics on the email records you use most. You can also resync prospects faster after import errors are resolved and customize your Einstein Attribution success milestone.

IN THIS SECTION:

Pardot Email Experience: Email Redesigned

Pardot marketers now have a more streamlined and user-friendly end-to-end email experience that uses the power of the Lightning Platform. The redesigned email experience includes enhanced email design capabilities, preview and test options, and a configurable send experience. Marketers can build email content optionally from templates and add images, HTML, plain text, and HML merge fields to customize their emails. They can save email content for reuse and then view reports on content performance.

Analytics and Reporting: Enhanced Experience

Find updates throughout Pardot's analytics offerings, including tuning options for Einstein Attribution, clearer B2B Marketing Analytics dashboards, and a beta feature that helps you sync custom fields. We also improved email reporting and made it easier for you to recalculate your own send email statistics.

Marketing Assets and Domains

New features put more power in the user's hands, including more secure domains, and other enhancements.

Add to Prospect Lists from Contact Related List on Accounts

In Summer '20 we added support for marketers to add to Pardot Lists and Engagement Studio Lists from certain records and list view pages. We expanded this support, allowing marketers to add to lists from the contact related list on account records. Add to Pardot lists from records and lists views without leaving Salesforce.

Sync Prospects with Resolved Errors More Easily

A new option on the Prospect Sync Errors page lets admins trigger prospects with resolved errors to sync with Salesforce. Fix existing errors, then return to the Prospect Sync Errors page in Pardot, select your prospects, and click the button to trigger a sync. Previously, prospects with resolved errors were manually synced or reimported into Pardot.

Get Cleaner Data in Standard Campaign Influence Reports

The Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report now filters to show only primary campaign members. We fixed an issue where all campaign member records appeared in the Contact column, which caused duplicates.

The ObjectChangeLog is Being Retired

The ObjectChangeLog is scheduled for retirement with the Winter '21 release for Salesforce orgs with Marketing Data Sharing enabled. If you use Marketing Data Sharing, and have custom logic built around the ObjectChangeLog to prevent certain records from syncing with Pardot, use Marketing Data Sharing rules instead.

Autofill Prospect Location Is Temporarily Unavailable

The option to have Pardot autofill prospect location based on the IP address is temporarily unavailable. For customers actively using this functionality, it's being removed December 14, 2020. Edit any workflows that rely on this data before the functionality is removed on December 14, 2020.

Pardot Support for Internet Explorer 11 Is Being Retired on December 31, 2020

Pardot support for Internet Explorer 11 (IE11) is scheduled for retirement on December 31, 2020. You can continue to use IE11 after the retirement date, but Pardot can't guarantee support for all features. Use one of our other supported browsers to access Pardot.

Pardot API: New and Changed Items

Use the Pardot API more effectively with these new features and changes.

Pardot API Version 5 (Beta)

Now you can try out a new, standardized version of the Pardot API. Version 5 of the Pardot API offers new endpoints so you can import your own external landing page templates and files into Pardot.

Pardot Email Experience: Email Redesigned

Pardot marketers now have a more streamlined and user-friendly end-to-end email experience that uses the power of the Lightning Platform. The redesigned email experience includes enhanced email design capabilities, preview and test options, and a configurable send experience. Marketers can build email content optionally from templates and add images, HTML, plain text, and HML merge fields to customize their emails. They can save email content for reuse and then view reports on content performance.

IN THIS SECTION:

Create Engaging Email Content with Ease

Seamlessly create and edit emails in Lightning Experience with more interactive design capabilities. Create emails from scratch or start from a template and customize in just a few clicks. Pardot marketers can drag email components right where they want them and add styling. Email content preview and details are available on the email content record. Create email content and design emails from the new Email Content tab available for Pardot users from the App Launcher.

Source Images from Salesforce CMS for Emails

Give users the power to quickly select images for email marketing content and templates from Salesforce CMS. No need to bother with separate file hosting or copy-and-paste errors when you turn on CMS to use with email content and templates. After you enable and configure the connection, users can access repositories at the click of a button.

Review Aggregate Email Metrics in Lightning Experience

Rollup metrics are available on email content and email template records. Marketers get an aggregate view of how certain content and templates perform based on statistics from everywhere they're used. Individual list email send and campaign-level email marketing reports are still available, too.

Preview and Test an Email in Lightning Experience

Users can preview and test emails from the email content record. Before sending an email to a large recipient list, do a trial run by sending it to a test list or individual email addresses. Preview and troubleshoot possible personalization issues by previewing as specific recipients.

Define Your Email Send

After building email content, marketers define who to send the email to before sending it as a list email. Select a campaign, recipient and suppression lists, sender options like send from name and email, and completion actions. The send experience gives marketers full control over who receives the email, when it's sent, and how replies are handled.

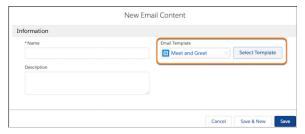
Create Engaging Email Content with Ease

Seamlessly create and edit emails in Lightning Experience with more interactive design capabilities. Create emails from scratch or start from a template and customize in just a few clicks. Pardot marketers can drag email components right where they want them and add styling. Email content preview and details are available on the email content record. Create email content and design emails from the new Email Content tab available for Pardot users from the App Launcher.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It is not available in Pardot Classic or the standalone Pardot app.

Who: Pardot marketers with the Access Drag-and-Drop Content Builder and Manage Email Content user permissions can access email design capabilities.

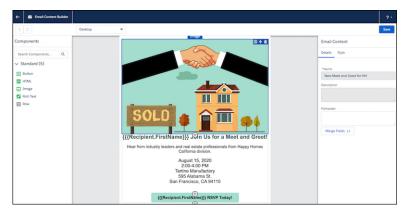
How: The new Email Content entity is available for Pardot users from the App Launcher. Marketers create an email content record from the Email Content tab and add components and design elements from the record. Creating an email from a template populates the email Subject and HTML Body fields from the template.



Click Edit in Builder from the record.



Add standard components, design each component, add images from CMS, style the email, and add merge fields.



SEE ALSO:

Interactively Create Engaging Email Templates

Salesforce Help: Create Emails in Lightning Experience (can be outdated or unavailable during release preview)

Source Images from Salesforce CMS for Emails

Give users the power to quickly select images for email marketing content and templates from Salesforce CMS. No need to bother with separate file hosting or copy-and-paste errors when you turn on CMS to use with email content and templates. After you enable and configure the connection, users can access repositories at the click of a button.

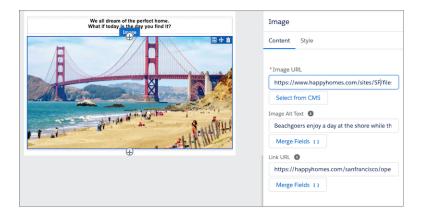
Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It is not available in Pardot Classic or the standalone Pardot app.

How: To use CMS images in Pardot emails, you must have a verified Salesforce-Pardot Connector and be using Connected Campaigns and Handlebars Merge Language. After these requirements are met, you can configure the CMS connection and permissions in Salesforce Setup. Add a domain, create or select a workspace and channel in CMS, and then designate a channel to use.



Note: Users of Professional Edition can now create a custom domain for use with Salesforce CMS and Pardot email. During setup, you can select only the Salesforce CMS Content Delivery Network (CDN) option. Creating custom domains for other uses and methods remains limited to Enterprise and Unlimited editions.

When designing email content, drag an image block onto the canvas, and click **Select from CMS**. Select an image, or click **Add Content** to insert an image. If the connected channel is used in more than one CMS workspace, click the workspace title to select another one and access different images. CMS images are available in image and HTML components, the rich-text editor, and the background.



SEE ALSO:

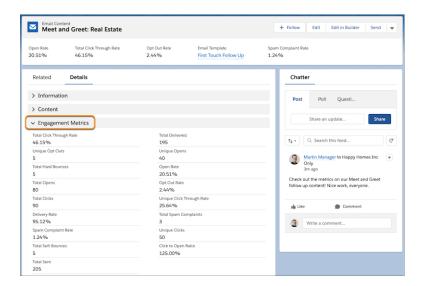
Salesforce Help: Manage Your Domains (can be outdated or unavailable during release preview) Serve CMS Content with a Content Delivery Network (CDN)

Review Aggregate Email Metrics in Lightning Experience

Rollup metrics are available on email content and email template records. Marketers get an aggregate view of how certain content and templates perform based on statistics from everywhere they're used. Individual list email send and campaign-level email marketing reports are still available, too.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It is not available in Pardot Classic or the standalone Pardot app.

How: No setup is necessary. Engagement metrics appear on the email template and email content detail pages.



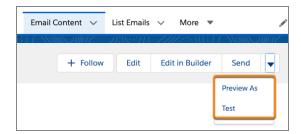
Preview and Test an Email in Lightning Experience

Users can preview and test emails from the email content record. Before sending an email to a large recipient list, do a trial run by sending it to a test list or individual email addresses. Preview and troubleshoot possible personalization issues by previewing as specific recipients.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It is not available in Pardot Classic or the standalone Pardot app.

Who: Pardot users with the Access Drag-and-Drop Content Builder and Manage Email Content user permissions can preview and test email content. To preview and test emails, users also need the Pardot permissions View Prospect and View Segmentation Lists to preview and test emails.

How: From an email content record, marketers select to preview as a prospect or send a test email to a list or selected individuals.



SEE ALSO:

Salesforce Help: Preview and Test Send Emails in Lightning (can be outdated or unavailable during release preview)

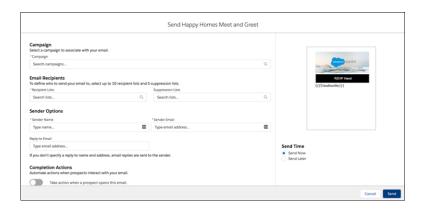
Define Your Email Send

After building email content, marketers define who to send the email to before sending it as a list email. Select a campaign, recipient and suppression lists, sender options like send from name and email, and completion actions. The send experience gives marketers full control over who receives the email, when it's sent, and how replies are handled.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It is not available in Pardot Classic or the standalone Pardot app.

Who: Pardot users with Manage Email Content user permission can send emails. Users also need the Pardot permissions Email Send, List Email Send, and Email Create, Campaign View and Segmentation List View.

How: Send and resend emails from the email content record. Emails are sent as list emails, and related email sends can be viewed from the Related tab of the record. Select send options, define completion actions, and schedule the email to send later in the modal.



SEE ALSO:

Salesforce Help: Send Emails in Lightning Experience (can be outdated or unavailable during release preview)

Analytics and Reporting: Enhanced Experience

Find updates throughout Pardot's analytics offerings, including tuning options for Einstein Attribution, clearer B2B Marketing Analytics dashboards, and a beta feature that helps you sync custom fields. We also improved email reporting and made it easier for you to recalculate your own send email statistics.

IN THIS SECTION:

Choose a Success Milestone for Pardot Einstein Attribution

Tune your Einstein Attribution model to more accurately reflect your business processes by choosing an opportunity lifecycle stage as the success milestone. The default setting tracks a conversion, or success, when an opportunity is created. But if that isn't ideal for your business, now you can change it. You can select this success milestone during initial setup or retrain the model based on the new criteria.

Understand Your Customer with New Campaign Insights

Einstein Campaign Insights now provides trend information about your prospect's company size. These insights describe the people who interact with your campaigns and assets to help you find engagement patterns and target the right people. With this new information, you can create an even better audience for your campaigns.

Get Clearer B2BMA Dashboard Metrics

Based on your feedback, we updated many of the labels on widgets throughout B2B Marketing Analytics to be clearer. For example, when a metric or filter originates from Salesforce or Pardot, or is a total or unique value, it is clearly noted (1). To find out more about a widget or value, a user can click a dashboard's Help button (2) to review the dashboard reference documentation.

Get Prospect Custom Field Data Faster (Beta)

This solution improves performance of your Pardot prospect custom fields across your analytics apps. Pardot Object Sync works by copying your custom prospect data into a new dataset. It improves performance in the Analytics platform because the prospect data can be updated separately from other large datasets.

View More Accurate Email Open and Click Rates in Pardot

We added filtering on email open and link click activity to exclude interactions from suspected security scanners. Email marketers and marketing managers will now see more accurate prospect scores, journeys, and completion actions that don't include scanner activity.

Choose a Success Milestone for Pardot Einstein Attribution

Tune your Einstein Attribution model to more accurately reflect your business processes by choosing an opportunity lifecycle stage as the success milestone. The default setting tracks a conversion, or success, when an opportunity is created. But if that isn't ideal for your business, now you can change it. You can select this success milestone during initial setup or retrain the model based on the new criteria.

Where: This change applies to Pardot Advanced and Pardot Premium editions with Salesforce Enterprise, Performance, and Unlimited editions.

How: In Salesforce Setup, find Einstein Attribution, and select which stage to use as your success milestone. If you are changing an attribution model, allow up to 24 hours for the model to reset and show new results.

SEE ALSO:

Salesforce Help: How Einstein Attribution Works (can be outdated or unavailable during release preview)

Understand Your Customer with New Campaign Insights

Einstein Campaign Insights now provides trend information about your prospect's company size. These insights describe the people who interact with your campaigns and assets to help you find engagement patterns and target the right people. With this new information, you can create an even better audience for your campaigns.

Where: This change applies to Lightning Experience for Pardot Advanced edition with Salesforce Enterprise, Performance, and Unlimited editions.

How: Rationale messages using this new data appear when your Campaign Insights model identifies a trend.

SEE ALSO:

Salesforce Help: How Einstein Campaign Insights Works (can be outdated or unavailable during release preview)

Get Clearer B2BMA Dashboard Metrics

Based on your feedback, we updated many of the labels on widgets throughout B2B Marketing Analytics to be clearer. For example, when a metric or filter originates from Salesforce or Pardot, or is a total or unique value, it is clearly noted (1). To find out more about a widget or value, a user can click a dashboard's Help button (2) to review the dashboard reference documentation.

Where: This change applies to Lightning Experience and Salesforce Classic and is included in Pardot Plus and Advanced. It's also available in Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.



SEE ALSO:

Salesforce Help: B2B Marketing Analytics Dashboards (can be outdated or unavailable during release preview)

Get Prospect Custom Field Data Faster (Beta)

This solution improves performance of your Pardot prospect custom fields across your analytics apps. Pardot Object Sync works by copying your custom prospect data into a new dataset. It improves performance in the Analytics platform because the prospect data can be updated separately from other large datasets.

Where: The setting applies to B2B Marketing Analytics and B2B Marketing Analytics Plus in Lightning Experience and Salesforce Classic.

- B2B Marketing Analytics Plus is available in Salesforce Enterprise, Unlimited, and Developer editions with Pardot Premium or the B2B Marketing Analytics Plus add-on.
- B2B Marketing Analytics is available in Pardot Plus and Advanced, and in Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.



Note: As a beta feature, Pardot Object Sync is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Pardot Object Sync in the IdeaExchange.

Why: Large orgs have experienced longer app loading times due to the way Salesforce and Pardot share custom field data. Because this setting duplicates data, we recommend it only for large orgs with tens of millions of data rows and fewer than 500 custom fields.

How: Enable the Pardot Object Sync in Salesforce Setup, and run the first sync. In Analytics Studio, open the Data Manager to verify that the sync is complete and that data appears as expected. To receive the updates, users must reconfigure any apps that use the prospect custom fields.

SEE ALSO:

Salesforce Help: Considerations for Pardot Object Sync (Beta) (can be outdated or unavailable during release preview)

View More Accurate Email Open and Click Rates in Pardot

We added filtering on email open and link click activity to exclude interactions from suspected security scanners. Email marketers and marketing managers will now see more accurate prospect scores, journeys, and completion actions that don't include scanner activity.

Where: This change applies to all Pardot editions.

How: Activity suspected to come from scanners will be filtered out automatically. You don't need to enable this feature or maintain a list of IP addresses.

Marketing Assets and Domains

New features put more power in the user's hands, including more secure domains, and other enhancements.

IN THIS SECTION:

Use WordPress Block Editor Seamlessly with the Pardot Plugin

The Pardot WordPress Plugin is now compatible with the WordPress Block Editor. Apply Pardot assets like forms and dynamic content blocks to WordPress pages using WordPress features.

Authenticate your WordPress Plugin with Salesforce SSO

We updated the authentication method available in the Pardot WordPress plugin. Authenticate with Salesforce SSO instead of Pardot Authentication for a more consistent experience between Pardot and Salesforce. The existing Pardot Authentication will be removed in February 2021.

Automatically Secure New Pardot Tracker Domains

A new option in your Pardot account settings lets Admins automatically enable SSL certificates for new tracker domains. SSL certificates make it possible for validated tracker domains to load securely over HTTPS. Previously, Pardot admins manually enabled SSL certificates for all tracker domains.

Customize More Pardot Assets with Any Tracker Domain

Now you can use any of your tracker domains to customize the links for Pardot form handlers, dynamic content, social posts, and multivariate landing page tests. Previously, these asset links defaulted to the primary tracker domain. Emails without templates are now the only Pardot assets that don't include this functionality.

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Automatically Secure New Pardot Tracker Domains

A new option in your Pardot account settings lets Admins automatically enable SSL certificates for new tracker domains. SSL certificates make it possible for validated tracker domains to load securely over HTTPS. Previously, Pardot admins manually enabled SSL certificates for all tracker domains.

Where: This change applies to all Pardot editions.

How: In your Pardot account settings, check the option to create SLL certificates for newly validated tracker domains.

Create SSL certificate for newly validated tracker domains
$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $
☐ Auto-fill Prospect Location Data from IP Address

SEE ALSO:

Salesforce Help: Automatically Enable SSL for New Tracker Domains (can be outdated or unavailable during release preview)

Customize More Pardot Assets with Any Tracker Domain

Now you can use any of your tracker domains to customize the links for Pardot form handlers, dynamic content, social posts, and multivariate landing page tests. Previously, these asset links defaulted to the primary tracker domain. Emails without templates are now the only Pardot assets that don't include this functionality.

Where: This change applies to all Pardot editions.

When: This feature is available to all Pardot customers as of July 2020.

How: Open a Pardot asset for editing, click the tracker domain dropdown, and select a domain to use.



SEE ALSO:

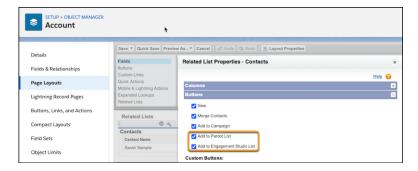
Salesforce Help: Customize Asset Links with Tracker Domains (can be outdated or unavailable during release preview)

Add to Prospect Lists from Contact Related List on Accounts

In Summer '20 we added support for marketers to add to Pardot Lists and Engagement Studio Lists from certain records and list view pages. We expanded this support, allowing marketers to add to lists from the contact related list on account records. Add to Pardot lists from records and lists views without leaving Salesforce.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: Add the Add to Pardot list and Add to Engagement Studio list options to the contact related list on the account page layout.

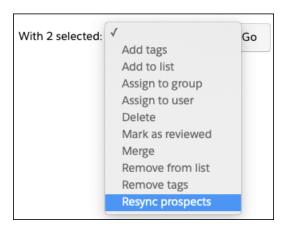


Sync Prospects with Resolved Errors More Easily

A new option on the Prospect Sync Errors page lets admins trigger prospects with resolved errors to sync with Salesforce. Fix existing errors, then return to the Prospect Sync Errors page in Pardot, select your prospects, and click the button to trigger a sync. Previously, prospects with resolved errors were manually synced or reimported into Pardot.

Where: This change applies to all Pardot Editions.

How: After you fix sync errors, return to the sync errors page in Pardot. Select the prospects with resolved errors, then click the dropdown menu to resync them.



SEE ALSO:

Salesforce Help: Clear Prospect Sync Errors (can be outdated or unavailable during release preview)

IdeaExchange: Resolve Salesforce Sync Errors from the sync error page

IdeaExchange: Re-sync option for Salesforce Prospect sync error list

Get Cleaner Data in Standard Campaign Influence Reports

The Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report now filters to show only primary campaign members. We fixed an issue where all campaign member records appeared in the Contact column, which caused duplicates.

Where: This change applies in Lightning Experience, Classic, and the Salesforce mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

The ObjectChangeLog is Being Retired

The ObjectChangeLog is scheduled for retirement with the Winter '21 release for Salesforce orgs with Marketing Data Sharing enabled. If you use Marketing Data Sharing, and have custom logic built around the ObjectChangeLog to prevent certain records from syncing with Pardot, use Marketing Data Sharing rules instead.

Where: This change applies to the Pardot Lightning App with Pardot Premium edition or Advanced edition purchased or upgraded after February 12, 2019.

Why: Marketing Data Sharing rules allow for the same customizations that previously could be built around the ObjectChangeLog. Eliminating the ObjectChangeLog reduces the demand placed on your Salesforce org for syncing records with Pardot.

SEE ALSO:

Salesforce Help: Configure Marketing Data Sharing Rules (can be outdated or unavailable during release preview)

Autofill Prospect Location Is Temporarily Unavailable

The option to have Pardot autofill prospect location based on the IP address is temporarily unavailable. For customers actively using this functionality, it's being removed December 14, 2020. Edit any workflows that rely on this data before the functionality is removed on December 14, 2020.

SEE ALSO:

Temporary Suspension of Pardot Prospect Location Data

Pardot Support for Internet Explorer 11 Is Being Retired on December 31, 2020

Pardot support for Internet Explorer 11 (IE11) is scheduled for retirement on December 31, 2020. You can continue to use IE11 after the retirement date, but Pardot can't guarantee support for all features. Use one of our other supported browsers to access Pardot.

When: Pardot support for IE11 ends on December 31, 2020.

SEE ALSO:

Pardot Browser Support

Pardot API: New and Changed Items

Use the Pardot API more effectively with these new features and changes.

Export API

Prospect object: Added support for exporting custom field data on prospect records.

Visitor activity object: Added procedure to retrieve only new and changed activity records.

SEE ALSO:

Developer Docs: Pardot API Documentation

Pardot API Version 5 (Beta)

Now you can try out a new, standardized version of the Pardot API. Version 5 of the Pardot API offers new endpoints so you can import your own external landing page templates and files into Pardot.

Where: This change applies to all Pardot editions.



Note: As a beta feature, v5 of the Pardot API is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for v5 of the Pardot API in this Google Form.

How: Enable access to the Pardot API v5 endpoints from your Pardot account settings.

SEE ALSO:

Developer Docs: Pardot API Documentation

Marketing: Transactional Sending and Behavioral Triggers in Journey Builder, Ecommerce Optimizer App in Datorama, Einstein in Interaction Studio

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

- October 2020 Release
- July 2020 Release
- March 2020 Release
- January 2020 Release
- October 2019 Release
- August 2019 Release
- June 2019 Release
- April 2019 Release
- January 2019 Release

SEE ALSO:

Marketing Cloud Overview

Marketing Cloud: Earlier Release Notes

Salesforce Marketing Cloud Facebook Page

Release Updates and Security Alerts: Generally Available with Improvements

View important updates and alerts in a single location in the generally available Release Updates. We added some enhancements to ensure that your Salesforce org stays up to date on all changes that affect its performance, security, and users.

IN THIS SECTION:

View Org Changes in One Location with Release Updates (Generally Available)

In case you missed it in the last release, Release Updates offers a more detailed view of information previously found in Critical Updates and Security Alerts. Find all of your updates and alerts in an improved format. No more clicking through several locations to review important update information for your Salesforce org.

Find Security Alerts in the Same Location as Release Updates

When you look for security alerts that affect your Salesforce org, find them in the Release Updates node. Previously, security alerts resided in a separate location.

Release Updates

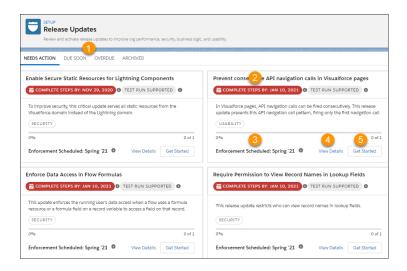
Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but which can affect your existing customizations. Find these important updates in the Release Updates node in Setup.

View Org Changes in One Location with Release Updates (Generally Available)

In case you missed it in the last release, Release Updates offers a more detailed view of information previously found in Critical Updates and Security Alerts. Find all of your updates and alerts in an improved format. No more clicking through several locations to review important update information for your Salesforce org.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions, except Database.com.

How: From Setup, in the Quick Find box, enter *Release Updates*.



1. Use tabs to view release updates for a specific category. **Archived** replaces the **Steps Completed** tab previously available in beta. When you view updates in **Due Soon**, **Overdue**, or **Archived**, a banner appears at the top indicating the status of the update. For example, a completed update in **Archived** displays the text "You've completed all recommended steps." It also includes enforcement information.



Note: In beta, the text "Due Soon" appeared at the top of the detail page for updates with upcoming enforcement dates.

This text has been removed.

- 2. Check the Complete Steps By date. Salesforce recommends completing your testing by this date because testing is not always supported beyond it.
- 3. To check the release in which Salesforce enforces the update, use the Enforcement Scheduled or Enforced In information. In the beta release, we indicated the enforcement information with "Automatically enforced in." To find out where to get the major release upgrade date for your instance, hover over the tooltip.
 - Note: Some release updates contain specific dates. In these cases, use the date information in the update as guidance for when to expect enforcement.
- 4. Get quick information about an update without leaving the home page by clicking View Details.
- 5. Start or stop a test run, complete update steps, and view step update history by clicking **Get Started**.

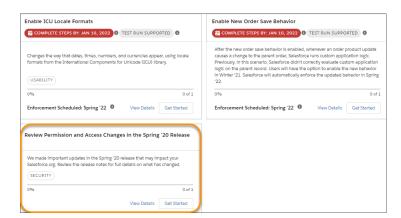
If extra steps have been added to an update since its original release, look for a horn icon, which indicates that the update has new steps to complete.

Find Security Alerts in the Same Location as Release Updates

When you look for security alerts that affect your Salesforce org, find them in the Release Updates node. Previously, security alerts resided in a separate location.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions, except Database.com.

How: From **Setup**, in the Quick Find box, enter *Release Updates*. In the Release Updates page, you can find security alert cards. Security alerts functionality remains the same.



Release Updates

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but which can affect your existing customizations. Find these important updates in the Release Updates node in Setup.

The Release Updates page provides a list of updates that affect your org. Each update includes step-by-step actions for you to take. To ensure a smooth transition, many release updates have test runs available. Use the test run option to enable and disable an update as often as needed before the "Complete Steps By" date so that you can evaluate its impact on your org.

Enforced Updates

These updates were announced in a previous release and are now enforced.

Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Enforced)

This update gives you more control over which guest, portal, or community users can access Apex classes containing <code>@AuraEnabled</code> methods. Add guest user profile access to any <code>@AuraEnabled</code> Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Enforced)

This update gives you more control over which authenticated users can access Apex classes containing <code>@AuraEnabled</code> methods. When this update is enforced, an authenticated user can access an <code>@AuraEnabled</code> Apex method only when the user's profile allows access to the Apex class. This update is enforced in Winter '21.

Legacy Transaction Security: End of Life

With the enhanced transaction security policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, all policies written with the legacy framework are disabled. Make sure to migrate your legacy transaction security policies to the new framework. This update was first made available in Winter '20.

Previously Released Updates

These updates were announced in a previous release and are still available.

Enable ICU Locale Formats (Previously Released Update)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

Require Permission to View Record Names in Lookup Fields (Previously Released Update)

To better protect your Salesforce org's data, we restricted who can view record names in lookup fields. Users must have Read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update was first made available in Spring '20.

Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Previously Released Update)

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

Stop Automated Field Updates from Suppressing Email Notifications (Previously Released Update)

This update, released in Summer '17, was scheduled for enforcement in Spring '20, but is now available only by contacting Salesforce Customer Support. For various operations, such as assigning a task to someone, you can choose to notify the affected user by email. This update stops processes, workflow rules, and Apex triggers from suppressing these email notifications.

Newly Announced Updates

These release updates are newly announced in Winter '21.

Disable Standard Object Edits on Standard Profile (Update)

Salesforce reserves standard object permissions in standard profiles, so modifications are not allowed. This update enforces a validation to block modifications to standard profile object permissions to ensure org integrity.

Require Verification When Community Users, Partners, and Customers Change Their Email Address (Update)

This security update requires external users to confirm their community email address changes.

Deploy a My Domain (Update)

To use the latest features and comply with browser requirements, all Salesforce orgs must have a My Domain. Deploy one, or we assign one for you based on your company name. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced in Winter '22.

Review the Org-Level Email Tracking Setting for Salesforce Inbox (Update)

This update corrects an inconsistency when Salesforce Inbox email tracking is disabled, but tracking features are still available to users and tracking information is still collected.

Require User Permission for the Send Custom Notification Action (Update)

This update gives you more control over which of your users can trigger the Send Custom Notification action. When this update is activated, a user must have the Send Custom Notifications user permission to trigger the Send Custom Notification action in flows that run in user context, REST API calls, or Apex callouts. Use the Send Custom Notifications user permission to improve the security of your Salesforce org and limit custom notifications to desired users and use cases.

Disable Rendering of HTML in Custom Field Labels (Update)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When enabled, HTML tags in custom field labels are rendered as plain text.

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Update) on page 459

With this update enabled, paused autolaunched flows always resume in the same context and with the same user access they had before they were paused.

Orders: New Behavior for Saving Orders (Update)

Now it's easier to run custom application logic on orders. Salesforce evaluates custom application logic when a new order product or edited order product causes a change to the parent order.

Postponed Updates

These updates are postponed.

Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of <code>@AuraEnabled</code> Apex controllers that don't specify with sharing or without sharing to default to with sharing.

Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the global access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Winter '21. To improve security and stability, this update prevents attribute values passed to \$A.createComponent() or \$A.createComponents() from being interpreted as Aura function expressions.

Enable Secure Static Resources for Lightning Components (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. To improve security, this update serves all static resources from the visual force domain instead of the lightning domain. This change prevents a script included in a static resource from accessing the document in the lightning domain due to the same-origin security policy.

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Winter '22. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null.

Enable Partial Save for Invocable Actions (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21, but has been postponed again to Spring '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

Enforce Data Access in Flow Merge Fields (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Summer '20, but has been postponed to Spring '21. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Disable Rules for Enforcing Explicit Access to Apex Classes update, released in Summer '20, was scheduled for auto-activation (enforcement) in Spring '21, but has been postponed to Summer '21. This release update replaces the Require User Access to Apex Classes Invoked by Flow update. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed) on page 463

This update, released in Spring '19, was scheduled for auto-activation (enforcement) in Spring '20, but has been postponed to Spring '21. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Removing the instance name makes domains shorter and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update is postponed to Summer '22.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Update, Postponed)

This update, released in Summer '20, was scheduled for auto-activation in Spring '21, but has been postponed to Winter '22. In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

Keep Working with Tab-Focused Dialogs (Update, Postponed)

This update, released in Winter '20, was scheduled for auto-activation in Winter '21, but has been postponed to Winter '22. In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it.

Retired Updates

This update was announced in a previous release but is retired. It was removed from the Release Updates node and won't be enforced.

Enable Dependency Access Checks In Lightning Components (Update, Retired)

This update has been retired and no longer requires any action.

Other Salesforce Products and Services

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the Heroku Changelog.

Customer Success Group

The certified experts, consultants, and innovative tools of Salesforce Customer Success Group are here to help with support, best practices, and professional services at every stage of your journey. With each release, we introduce new and better ways to help you see results from all your Salesforce products, faster. Highlights for this release include:

- Premier Success Plans available for Salesforce Anywhere, work.com, Security Center, and more
- New and refreshed Accelerators, including options for work.com, Salesforce Maps, and Service Cloud Voice
- New Jump Starts and Transformation engagements for DatoramaSimplified Support case logging and new in-app resources
- Proactive Monitoring enhancements

All of these new offers and enhancements are available worldwide.

myTrailhead: Streamline Your Users' Login Experience with Salesforce Identity for myTrailhead

Salesforce Identity for myTrailhead offers quick, easy access to myTrailhead. Your users aren't required to register with Salesforce Trailhead or create a profile. Salesforce Identity for myTrailhead uses an authentication provider that you control, so it lets you grant myTrailhead access to a specific audience. For example, you can target myTrailhead access for your internal users or your community members.

IN THIS SECTION:

Log In to myTrailhead in One Easy Step

With Salesforce Identity for myTrailhead, users bypass the multistep Salesforce Trailhead account setup and login process. Building single sign-on links isn't necessary, because a myTrailhead URL is a direct link to myTrailhead. Trail Tracker users can assign and report on Trailblazer activity exclusively for myTrailhead.

Log In to myTrailhead in One Easy Step

With Salesforce Identity for myTrailhead, users bypass the multistep Salesforce Trailhead account setup and login process. Building single sign-on links isn't necessary, because a myTrailhead URL is a direct link to myTrailhead. Trail Tracker users can assign and report on Trailblazer activity exclusively for myTrailhead.

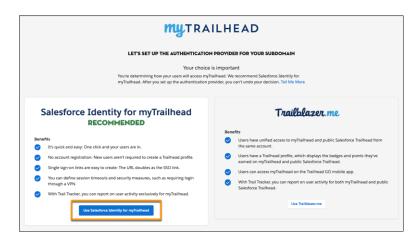
Where: myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost. Salesforce Identity for myTrailhead is available to customers who haven't created their myTrailhead subdomain, or who have a subdomain where nobody has submitted an answered guiz.

Who: Users with the myTrailhead Content Access permission can log in to their company's myTrailhead site. Users with the myTrailhead Branding Management, Customize Application, and either Modify All Data or Manage Connected Apps permissions can create a connected app and configure Salesforce Identity for myTrailhead.

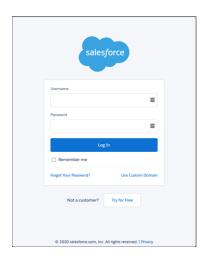
How: After you create your company's myTrailhead subdomain, you're prompted to set up the authentication provider for myTrailhead.



We recommend Salesforce Identity for myTrailhead because it gives your users the quickest, easiest access to your content. But if you want your users to have access to both myTrailhead and Salesforce Trailhead, use Trailblazer.me.



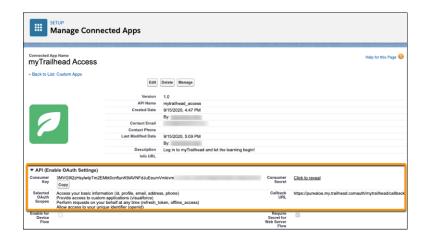
With Salesforce Identity for myTrailhead, you specify which login URL serves as your authentication page for myTrailhead.



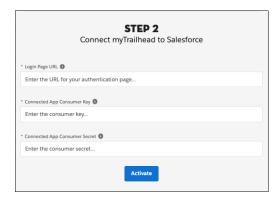


If you want your internal users to access myTrailhead, use your My Domain URL. When you do, you can also enable single logout, so that when users log out of Salesforce, they're logged out of myTrailhead. If you don't have My Domain set up in your Salesforce org, use http://login.salesforce.com.lfyou want your community members to access myTrailhead, use the URL for your community.

You also create a connected app in your Salesforce org to tie myTrailhead to your org. The connected app facilitates data sharing between myTrailhead and your Salesforce org using OpenID Connect and OAuth2.0.



To complete the configuration, enter the URL for your authentication page and two details from your connected app on the setup page for Salesforce Identity for myTrailhead. Then click **Activate**.



SEE ALSO:

Salesforce Help: Set Up the Authentication Provider for Your myTrailhead Subdomain (can be outdated or unavailable during release preview)

Spotlight on Content

We added information about our latest content enhancements, including new solution kits, new videos, and a new home for Identity content. Legal documentation has been moved to its own section.

IN THIS SECTION:

Access All Identity Content in One Place

To improve your Salesforce experience, we relocated all identity content to a new home in Salesforce Help. Now, instead of searching for identity content scattered throughout Salesforce Help and developer.salesforce.com, you can go to a single location. There you can find all identity help and implementation content such as user authentication, connected apps, OAuth, Identity for Customers and Partners, and much more. So come visit, and welcome to our new identity content home.

Solve Cross-Cloud Solutions with Salesforce Solution Kits

Salesforce solution kits help you implement solutions to complex, cross-cloud use cases. Each solution kit includes recommendations for specific products, configurations, and best practices.

Watch Videos (English Only)

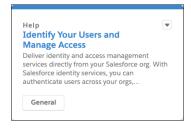
We created and updated instructional videos to help your users learn about new and improved Salesforce features.

Access All Identity Content in One Place

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Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

How: Head over to the Identify Your Users and Manage Access Help section to discover all Salesforce identity help content.



Solve Cross-Cloud Solutions with Salesforce Solution Kits

Salesforce solution kits help you implement solutions to complex, cross-cloud use cases. Each solution kit includes recommendations for specific products, configurations, and best practices.

New Solution Kits

Run Conversational Campaigns for WhatsApp Solution Kit

Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.

Run Conversational Campaigns for SMS Solution Kit

Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.

Synchronize Product and Pricing Data Solution Kit

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

Link Cart to Quote Solution Kit

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

Link Cart to Cash Solution Kit

Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.

Communicate Store Changes Solution Kit

Build trust with your customers by keeping them updated on your store policies, hours, and any changes to locations.

Schedule an Appointment Solution Kit

Implement scalable processes to let shoppers schedule appointments to meet locally managed or customer-preferred social distancing preferences.

Facilitate Curbside Pickup Solution Kit

Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.

Create a Loan Forbearance Solution

Get a handle on the high volume of requests for loan modifications occasioned by the COVID-19 pandemic economy. Salesforce Cross-Cloud tools provide digital channels to address borrower needs responsively while reducing traffic to call centers and adding visibility to the process.

Updated Solution Kits

Turn Abandoned Carts into Completed Sales Solution Kit

Connect with shoppers who add items to their carts but don't finish orders. Send personalized behavioral messages that encourage them to return and complete and purchase.

Redeem Coupons Solution Kit

Offer targeted customer journeys and increase positive purchasing decisions. Increase completed purchases, personalize the experience, and track coupon usage.

Order on Behalf of a Customer Solution Kit

Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.

Personalize Marketing Recommendations Solution Kit

Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.

Keep Customers in the Loop with Transactional Email Solution Kit

Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.

View Order History and Cancel Orders Solution Kit

Enhance customer service and let your agents cancel orders. Personalize the experience by connecting Commerce Cloud and Service Cloud.

Engage Customers with Conversational Commerce Solution Kit

Provide richer customer service and drive sales when you implement live agent chat or chatbots within Commerce Cloud. Build brand loyalty, check order status, and offer extra assistance at the hands of service agents.

Implement Seamless Cross-Cloud Identity Solution Kit

Unify customer data with a single identity for each customer across your ecommerce sites and your communities. Enable one identity and give the customer visibility through the entire product catalog.

Explore Cross-Cloud Engagement Data Models Solution Kit

Improve customer loyalty by establishing a common profile for each customer across Marketing Cloud, Commerce Cloud, and Sales, Service, or Community Clouds. Determine the best system of record for each type of customer data to take advantage of out-of-the-box cloud integrations.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new Focus on Report Results in Salesforce Console video shows how to view report data in a fast-paced Salesforce Console environment. You can access the results you want with a single click without losing your focus.
- The new Configure SAML Single Sign-On with Salesforce as the Identity Provider video shows how to configure single sign-on with your Salesforce org as the Identity provider. See how to enable your Salesforce users to log in to an external app with their Salesforce credentials.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.